COUNTY OF LOS ANGELES
Public Health

BARBARA FERRER, Ph.D., M.P.H., M.Ed.
Director

MUNTU DAVIS, M.D., M.P.H.
County Health Officer

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BOARD OF SUPERVISORS

Hilda L. Solis
First District

Holly J. Mitchell
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Kathryn Barger
Fifth District

February 04, 2025

The Honorable Board of Supervisors
County of Los Angeles
383 Kenneth Hahn Hall of Administration
500 West Temple Street
Los Angeles, California 90012

Dear Supervisors:

**APPROVAL TO AMEND A SOLE SOURCE DATA MANAGEMENT SERVICES CONTRACT WITH
AUTOMATED CASE MANAGEMENT SYSTEMS, INC.
TO EXTEND THE TERM THROUGH FEBRUARY 28, 2026
(ALL SUPERVISORIAL DISTRICTS) (3 VOTES)**

**CIO RECOMMENDATION: APPROVE (X) APPROVE WITH MODIFICATION ( )
DISAPPROVE ( )**

SUBJECT

Request approval to execute a sole source amendment to sole source Contract Number H-204251
for the provision of Data Management (DM) services with Automated Case Management Systems,
Inc. for HIV Casewatch to extend the term effective
March 1, 2025, through February 28, 2026, with an option to extend the term for an additional six
months, as needed, through August 31, 2026. An extension is needed to keep HIV Casewatch
operational while Public Health implements a new DM system previously approved by your Board on
October 8, 2024.

IT IS RECOMMENDED THAT THE BOARD:

1. Approve and instruct the Director of the Department of Public Health (Public Health), or designee,
to execute a sole source contract amendment, substantially similar to Exhibit I, with Automated Case
Management Systems, Inc. (ACMS) for the provision of Data Management (DM) services for various
HIV/STD services contracts, to extend the contract term for 12 months, at an annual maximum
obligation of $660,000 through February 28, 2026, with an option to extend the term for an additional
six months, as needed, through August 31, 2026, contingent upon performance and the availability
of funding, and exercised through written notification from the Director of Public Health, or designee,

to the Contractor prior to the end of the contract term; 100 percent funded by Health Resources and Services Administration (HRSA) Ryan White Program (RWP) Part A funds, Assistance Listing Number (ALN) 93.914, HRSA Ending the HIV Epidemic (EHE) funds, ALN 93.686 and existing Departmental resources.

2. Delegate authority to the Director of Public Health, or designee, to execute amendments to Contract Number H-204251 that provide an increase or decrease in funding up to 10 percent above or below the annual base maximum obligation effective upon execution or beginning of applicable funding period; rollover unspent contract funds, if allowable by the grantor; update the statement of work and/or scope of work, as necessary; and/or correct errors in the contract's terms and conditions, subject to review and approval by County Counsel, and the Chief Information Office (CIO), and notification to your Board and the Chief Executive Office (CEO).

3. Delegate authority to the Director of Public Health, or designee, to execute change notices to the contract that authorize modifications to the budget with corresponding modifications to the statement of work, that are within the same scope of services, as necessary, and changes to hours of operation and/or service locations.

4. Delegate authority to the Director of Public Health, or designee, to immediately suspend or terminate the contract upon issuing written notice if contractor fails to perform and/or fully comply with program requirements and terminate the contract for convenience by providing a 30-calendar day advance written notice to contractor.

PURPOSE/JUSTIFICATION OF RECOMMENDED ACTION

Public Health's Division of HIV and STD Programs (DHSP) has approximately 108 HIV/AIDS care service contracts that require ongoing submission of client-level data to State and federal funders. DHSP's current DM system, HIV Casewatch, managed by ACMS, is used to meet this reporting requirement. This system includes a significant amount of historical information and is used by all DHSP contracted HIV care service providers for invoicing and other critical financial functions. HIV Casewatch includes database services such as: administration, security, maintenance, encryption, conversion and migration, design and modification, and development of interfaces with other Electronic Health Record systems.

The DM system is used as a tool to help quantify the delivery of HIV/AIDS care services to people living with HIV/AIDS and is an important tool to ensure accountability and productivity among contracted providers. HIV Casewatch also provides valuable clinical outcome data for clients served by DHSP.

Public Health will be transitioning to e2LAS, a new DM system, approved by your Board on October 8, 2024, that will conform to Los Angeles County's (LAC) data system requirements and replace HIV Casewatch. The new data system will improve DHSP's ability to meet reporting requirements, improve reporting efficiency, add new data system functionality, as well as meet or exceed County data security requirements.

The ACMS contract must be extended to allow for the continuation of data management services and must be operational to allow contracted providers to complete data submission, invoicing, and reporting for the remainder of fiscal year (FY) 2024/25 through the first quarter of FY 2025/26. In addition, Public Health will need to have HIV Casewatch and e2LAS operating simultaneously during the transition period to allow Public Health to migrate critical client data from HIV Casewatch to

e2LAS.

Approval of Recommendation 1 will allow Public Health to continue providing uninterrupted HIV data management and billing support to DHSP contracted HIV/AIDS care services providers and ensure compliance with State and federal data collection and reporting requirements associated with the delivery of HIV Care services to LAC residents. Public Health must continue extending these services until the e2LAS DM system is fully developed, implemented, and functioning. Upon successful development and implementation of e2LAS, DHSP will need to have the two systems operating concurrently to allow Public Health time to reconcile all final data variables in the transfer between data management systems. This will ensure that data collection efforts are not jeopardized nor interrupted before the new DM system is finalized.

Approval of Recommendation 2 will allow Public Health to execute an amendment to the contract to provide an increase and/or decrease funding up to 10 percent above or below each term's annual base maximum obligation; rollover unspent contract funds; update the statement of work and/or scope of work; and/or correct errors in the contract's terms and conditions, as necessary.

Approval of Recommendation 3 will allow Public Health to execute change notices to the contract such as authorizing modifications to, or within budget categories, with corresponding modifications to the statement of work and/or scope of work that are within the same scope of services, as necessary; and changes to hours of operation and/or service locations.

Approval of Recommendation 4 will allow Public Health to immediately suspend or terminate the contract if the contractor fails to perform and/or fully comply with contract requirements; and to terminate the contract for convenience by providing 30-calendar days advance written termination notice to the contractor.

Implementation of Strategic Plan Goals

The recommended actions support North Star 1, Make Investments that Transform Lives, of the County's Strategic Plan.

FISCAL IMPACT/FINANCING

The total program cost for the amendment is $660,000 for the term effective March 1, 2025, through February 28, 2026; and up to an additional $330,000, if needed, to extend the agreement for an additional six months, 100 percent funded by HRSA RWP Part A funds, HRSA EHE funds, and existing Departmental resources.

Funding for this contract is included in Public Health's Adopted Budget for FY 2024-25 and will be included in future FYs, as necessary.

There is no additional net County cost associated with this action.

FACTS AND PROVISIONS/LEGAL REQUIREMENTS

DHSP initiated a multi-phased modernization initiative to replace its outdated legacy DM systems. In February 2018, Phase I of the DM system modernization effort began with the implementation of the On-line Real-Time Centralized Health Information Database (ORCHID) to track clinical services such as STD screening, diagnosis and treatment and pre-exposure prophylaxis (PrEP) services provided in Public Health sexual health clinics.

Phase II includes the extension of the ACMS contract until the new E2LAS DM system is implemented and fully functional. The final phase includes the full migration and implementation of the new DM system.

The continuation of the HIV Casewatch system in the interim will help DHSP maintain its current operations and avoid federal sanctions up to, and including, the elimination of federal funding for these services to LAC.

As required under Board Policy 5.100, your Board was notified on October 17, 2024, of Public Health's intent to extend the term of the sole source contract with ACMS.

County Counsel has reviewed and approved Exhibit I as to form. Attachment A is the Sole Source Checklist signed by the CEO. The CIO has reviewed this request and has determined that this does not introduce any new technology-related issues that would necessitate a formal CIO analysis.

CONTRACTING PROCESS

Since the original award, Contract Number H-204251 has undergone multiple amendments including term extensions, adjustments to funding allocations, and revisions to the statement of work and scope of work.

On February 7, 2023, your Board approved an amendment to Contract Number H-204251, to extend the contract term for 12 months through February 29, 2024, with an option to extend the contract term through February 28, 2025, with notification to the Contractor.

On February 1, 2024, Public Health notified ACMS of its intent to exercise the optional extension term and extended the contract for 12 additional months through February 28, 2025.

This current extension will allow for the continuation of DM services and for Public Health to continue the development, implementation and migration of client level data into the new e2LAS DM system.

IMPACT ON CURRENT SERVICES (OR PROJECTS)

Approval of the recommended actions will allow Public Health to continue providing uninterrupted HIV data management and billing support to Public Health contracted HIV/AIDS care and treatment providers and ensure compliance with State and federal data collection and reporting requirements associated with the delivery of HIV/AIDS care services to LAC residents.

Respectfully submitted,

Barbara Ferrer, PhD, MPH, MEd

Director

Peter Loo

Chief Information Officer

BF:mo
BL #07965

Enclosures

c: Chief Executive Officer
     County Counsel
     Executive Officer, Board of Supervisors

SOLE SOURCE CHECKLIST

Department Name: _____

☐ New Sole Source Contract   Automated Case Management Systems, Inc.

☐ Sole Source Amendment to Existing Contract
Date Existing Contract First Approved: _____

Check (✓)	JUSTIFICATION FOR SOLE SOURCE CONTRACTS AND AMENDMENTS Identify applicable justification and provide documentation for each checked item.
	➢ Only one bona fide source (monopoly) for the service exists; performance and price competition are not available. A monopoly is an "*Exclusive control of the supply of any service in a given market. If more than one source in a given market exists, a monopoly does not exist*."
	➢ Compliance with applicable statutory and/or regulatory provisions.
	➢ Compliance with State and/or federal programmatic requirements.
	➢ Services provided by other public or County-related entities.
	➢ Services are needed to address an emergent or related time-sensitive need.
	➢ The service provider(s) is required under the provisions of a grant or regulatory requirement.
	➢ Services are needed during the time period required to complete a solicitation for replacement services; provided services are needed for no more than 12 months from the expiration of an existing contract which has no available option periods.
	➢ Maintenance and support services are needed for an existing solution/system during the time to complete a solicitation for a new replacement solution/system; provided the services are needed for no more than 24 months from the expiration of an existing maintenance and support contract which has no available option periods.
	➢ Maintenance service agreements exist on equipment which must be serviced by the original equipment manufacturer or an authorized service representative.
	➢ It is more cost-effective to obtain services by exercising an option under an existing contract.
	➢ It is in the best economic interest of the County (e.g., significant costs and time to replace an existing system or infrastructure, administrative cost and time savings and excessive learning curve for a new service provider, etc.). In such cases, departments must demonstrate due diligence in qualifying the cost-savings or cost-avoidance associated with the best economic interest of the County.

Erika Bonilla
_____   _____
Chief   Executive Office   Date

EXHIBIT I

Contract No. H-204251

Amendment No. 30

**HUMAN IMMUNODEFICIENCY VIRUS (HIV)/
ACQUIRED IMMUNE DEFICIENCY SYNDROME (AIDS)
DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND
MAINTENANCE SERVICES AGREEMENT**

THIS AMENDMENT is made and entered on_____.

by and between   COUNTY OF LOS ANGELES
                                        (hereafter "County"),

and   AUTOMATED CASE MANAGEMENT
                                        SYSTEMS, INC.
                                        (hereafter "Contractor").

WHEREAS, reference is made to that certain agreement entitled "HUMAN IMMUNODEFICIENCY VIRUS (HIV)/ACQUIRED IMMUNE DEFICIENCY SYNDROME (AIDS) DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND MAINTENANCE SERVICES AGREEMENT", dated January 3, 1995, identified as Agreement Number H-204251, and all subsequent amendments (all hereinafter "Agreement"); and

WHEREAS, on February 4, 2025, the Board of Supervisors authorized the Director of Public Health (Public Health), or designee, to execute an amendment to the Agreement to extend the term for 12 months through February 28, 2026, with an option to extend the term for an additional six months, as needed, through written notification from the Director of Public Health, or designee, to the Contractor prior to the end of the contract term; and

WHEREAS, County has been allocated funds from the Health Resources and Services Administration, ("HRSA"), which is authorized by the Ryan White Comprehensive AIDS Resources Emergency Act of 1990, its amendments of 1996, and Subsequent Reauthorizations of the Act ("Ryan White Program") Part A funds; Assistance Listing Number (ALN) 93.914; HRSA Ending the HIV Epidemic ("EHE"); ALN 93.686; and

DHSP ACMS H-204251-30

- 1 -

net County cost funds ("NCC"), a portion of which have been designated to this Agreement; and

WHEREAS, it is the intent of the parties hereto to amend the Agreement to extend the term through February 28, 2026,for the continued provision of data management, training, systems license and maintenance services; and make other hereafter designated changes, including updating certain terms and provisions and amending exhibits and schedules to update the statement of work and budget(s); and

WHEREAS, if needed, parties hereto agree to extend the term for an additional six months through written notification from the Director of Public Health or designee to the Contractor prior to the end of the contract term;

WHEREAS, said Agreement provides that changes may be made in the form of a written amendment which is formally approved and executed by the parties; and

WHEREAS, Contractor warrants that it continues to possess the competence, expertise, and personnel necessary to provide services consistent with the requirements of this Agreement and consistent with the professional standard of care for these services.

NOW, THEREFORE, the parties hereto agree as follows:

1. This Amendment is effective upon execution for the period of March 1, 2025 through February 28, 2026.

2. The first paragraph of Paragraph 1, <u>TERM,</u> is deleted in its entirety and replaced as follows:

"This Agreement is effective January 3, 1995 through February 28, 2026, subject to the availability of federal, State, or County funding sources. In any event, the County may terminate this Agreement in accordance with the <u>TERMINATION</u> Paragraphs of the ADDITIONAL PROVISIONS hereunder. The County will have the sole option to extend this Contract term for an additional six-month period through August 31, 2026. Each such extension option may be exercised at the sole discretion of the Director through written notification from the Director to Contractor prior to the end of the Contract term."

3. Paragraph 2, <u>DESCRIPTION OF SERVICES</u>, is deleted in its entirety and replaced to read as follows:

"A.   Contractor will provide services in the manner described in Exhibits (Statements of Work and Scopes of Work), attached hereto and incorporated by reference.

B.   Contractor acknowledges that the quality of service(s) provided under this Contract will be at least equivalent to that which Contractor provides to all other clients it serves.

C.   If Contractor provides any tasks, deliverables, goods, services, or other work, other than as specified in this Agreement, the same will be deemed to be a gratuitous effort on the part of Contractor, and Contractor will have no claim whatsoever against the County.

D.   Federal Award Information for this Agreement is detailed in Exhibits JJ, JJ.1 and JJ.2, Notice of Federal Subaward Information."

4.   Paragraph 3, <u>MAXIMUM OBLIGATION OF COUNTY</u>, Subparagraphs HH and HI are added to read as follows:

"HH. During the period of March 1, 2025 through February 28, 2026, the maximum obligation of County for all services provided hereunder will not exceed six hundred sixty thousand dollars ($660,000).

Such maximum obligation is comprised of Ryan White Program, Part A funds, HRSA EHE funds and NCC funds. This sum represents the total maximum obligation of the County as shown in Schedule 43."

HI.   If option to extend is needed, during the period of March 1, 2026 through August 31, 2026, the maximum obligation of County for all services provided hereunder will not exceed three hundred thirty thousand dollars ($330,000).

Such maximum obligation is comprised of Ryan White Program, Part A funds, HRSA EHE funds and NCC funds. This sum represents the total maximum obligation of the County as shown in Schedule 44."

5.   Paragraph 6, <u>COMPENSATION</u>, is amended to read as follows:

"The County agrees to compensate Contractor for performing services hereunder for actual allowable paid cost as set forth in Schedules 1 through 44 and the <u>BILLING AND PAYMENT</u> Paragraph of the Agreement. Invoices and

cost reports must be submitted and will be paid in accordance with approved line-item detailed budgets."

6.   Paragraph 8, <u>CONSIDERATION OF HIRING GAIN/GROW PARTICIPANTS</u>, is deleted in its entirety and replaced as follows:

"A.   Should Contractor require additional or replacement personnel after the effective date of this Contract, Contractor will give consideration for any such employment openings to participants in the County's Department of Public Social Services Greater Avenues for Independence (GAIN) Program or Skills and Training to Achieve Readiness for Tomorrow (START) Program who meet Contractor's minimum qualifications for the open position(s). For this purpose, consideration means that Contractor will interview qualified candidates. The County will refer GAIN/START participants by job category to Contractor. Contractor must report all job openings with job requirements to: <u>gainstart@dpss.lacounty.gov</u> and <u>bservices@opportunity.lacounty.gov</u> and DPSS will refer qualified GAIN/START job candidates.

B.   In the event that both laid-off County employees and GAIN/GROW participants are available for hiring, County employees must be given first priority."

7.   Paragraph 12, <u>CONFIDENTIALITY</u>, Subparagraph A, is deleted in its entirety and replaced as follows:

"A. Contractor must maintain the confidentiality of all records and information in accordance with all applicable federal, State, and local laws, rules, regulations, ordinances, directives, guidelines, policies, and procedures relating to confidentiality, including, without limitation, County policies concerning information technology security and the protection of confidential records and information. In the event of a breach, suspected breach, or unlawful use or disclosure of confidential records, Contractor must immediately, no later than 24 hours after discovery, notify the County's Project Manager."

8.   Paragraph 25, <u>TERMINATION FOR INSOLVENCY, DEFAULT, AND/OR IMPROPER CONSIDERATIONS, AND CONVENIENCE</u>, Subparagraph B, is deleted in its entirety and replaced as follows:

"The County may, by written notice to Contractor, terminate the whole or any part of this Contract, if, in the judgement of County's Project Director:

A.   Contractor has materially breached this Contract; or

B.   Contractor fails to timely provide and/or satisfactorily perform any task, deliverable, service, or other work required either under this Contract; or

C.   Contractor fails to demonstrate a high probability of timely fulfillment of performance requirements under this Contract, or of any obligations of this Contract and in either case, fails to demonstrate convincing progress toward a cure within five working days (or such longer period as the County may authorize in writing) after receipt of written notice from the County specifying such failure.

In the event that the County terminates this Contract in whole or in part as provided hereinabove, the County may procure, upon such terms and in such manner as the County may deem appropriate, goods and services similar to those so terminated. Contractor will be liable to the County for such similar goods and services. Contractor will continue the performance of this Contract to the extent not terminated under the provisions of this Paragraph.

Except with respect to defaults of any subcontractor, Contractor will not be liable for any such excess costs of the type identified in the Paragraph above if its failure to perform this Contract arises out of causes beyond the control and without the fault or negligence of Contractor. Such causes may include, but are not limited to: acts of God or of the public enemy, acts of the County in either its sovereign or contractual capacity; acts of federal or State governments in their sovereign capacities; or fires, floods, strikes, freight embargoes, and unusually severe weather; but in

every case, the failure to perform must be beyond the control and without the fault or negligence of Contractor. If the failure to perform is caused by the default of a subcontractor, and if such default arises out of causes beyond the control of both Contractor and any subcontractor, and without the fault or negligence of either of them, Contractor will not be liable for any such excess costs for failure to perform, unless the goods or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit Contractor to meet the required performance schedule. As used in this Paragraph, the term "subcontractor(s)" means subcontractor(s) at any tier.

If, after the County has given notice of termination under the provisions of this Paragraph, it is determined by the County that Contractor was not in default under the provisions of this Paragraph or that the default was excusable under the provisions hereinabove, the rights and obligations of the parties will be the same as if the notice of termination had been issued pursuant to the Paragraph entitled TERMINATION FOR CONVENIENCE, herein.

The rights and remedies of County provided in this Paragraph are not exclusive and are in addition to any other rights and remedies provided by law or under this Contract."

9.   Paragraph 63, <u>PUBLIC RECORDS ACT</u>, will be added to the ADDITIONAL PROVISIONS of the Agreement to read as follows:

"Any documents submitted by Contractor; all information obtained in connection with the County's right to audit and inspect the Contractor's documents, books, and accounting records pursuant to the RECORD RETENTION AND AUDITS Paragraph of this Contract; as well as those documents which were required to be submitted in response to the solicitation process for this Contract, become the exclusive property of the County. All such documents become a matter of public record and will be regarded as public records. Exceptions listed in California Government Code Section 7921.000 et seq. (Public Records Act) may be applied to

documents which are marked "trade secret," "confidential," or "proprietary." The County will not in any way be liable or responsible for the disclosure of any such records including, without limitation, those so marked, if disclosure is required by law, or by an order issued by a court of competent jurisdiction.

B.   In the event the County is required to defend an action on a Public Records Act request for any of the aforementioned documents, information, books, records, and/or contents of a proposal marked "trade secret," "confidential," or "proprietary," Contractor agrees to defend and indemnify the County from all costs and expenses, including reasonable attorney's fees, in action or liability arising under the Public Records Act."

10.   Paragraph 64, <u>CAMPAIGN CONTRIBUTION PROHIBITION FOLLOWING FINAL DECISION IN CONTRACT PROCEEDING</u>, is added to the Agreement as follows:

"Pursuant to Government Code Section 84308, Contractor and its subcontractors are prohibited from making a contribution of more than $250 to a County officer for 12 months after the date of the final decision in the proceeding involving this Contract, including any amendment to this Contract. Failure to comply with the provisions of Government Code Section 84308 and of this paragraph, may be a material breach of this Contract as determined in the sole discretion of the County."

11.   Exhibit JJ.2, Notice of Federal Subaward Information, attached hereto and incorporated herein by reference, is added to the Agreement.

12.   Exhibit KK-1 and KK-2, SCOPES OF WORK for HIV/AIDS DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND MAINTENANCE SERVICES, attached hereto and incorporated herein by reference, are added to the Agreement.

13.   Schedules 43 and 44, BUDGETS FOR HIV/AIDS DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND MAINTENANCE SERVICES, attached hereto and incorporated herein by reference, are added to the Agreement

14.   Except for the changes set forth herein above, the Agreement will not be

changed in any other respects by this Amendment.

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IN WITNESS WHEREOF, the Board of Supervisors of the County of Los Angeles has caused this Amendment to be executed by its Director of Public Health, or designee, and Contractor has caused this Amendment to be executed in its behalf by its duly authorized officer, the day, month, and year first above written.

COUNTY OF LOS ANGELES

By _____
Barbara Ferrer, Ph.D., M.P.H., M.Ed.
Director

AUTOMATED CASE MANAGEMENT
SYSTEMS, INC.
Contractor

By _____
Signature

_____
Printed Name

Title _____

APPROVED AS TO FORM
BY THE OFFICE OF THE COUNTY COUNSEL
DAWYN R. HARRISON
County Counsel

APPROVED AS TO CONTRACT
ADMINISTRATION:

Department of Public Health

By _____
Contracts and Grants Division Management

#07965:mo

SCHEDULE 43

AUTOMATED CASE MANAGEMENT SYSTEMS, INC.

HIV/AIDS DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND MAINTENANCE SERVICES

	Budget Period March 1, 2025 through February 28, 2026
Salaries	$ 0
Employee Benefits	$ 0
Travel	$ 0
Equipment	$ 0
Supplies	$ 0
Other Costs	$ 660,000
Indirect Cost	$ 0
TOTAL PROGRAM BUDGET	$ 660,000

During the term of this Agreement, any variation to the above budget must be executed through a written Change Notice, executed by the Division of HIV and STD Programs' Director and the Contractor. Funds may only be utilized for eligible program expenses. Invoices and cost reports must be submitted and will be paid in accordance with approved line-item detailed budgets.

(OPTIONAL TERM IF EXERCISED)

SCHEDULE 44

AUTOMATED CASE MANAGEMENT SYSTEMS, INC.

HIV/AIDS DATA MANAGEMENT, TRAINING, SYSTEMS LICENSE AND MAINTENANCE SERVICES

	Budget Period March 1, 2026 through August 31, 2026
Salaries	$ 0
Employee Benefits	$ 0
Travel	$ 0
Equipment	$ 0
Supplies	$ 0
Other Costs	$ 330,000
Indirect Cost	$ 0
TOTAL PROGRAM BUDGET	$ 330,000

During the term of this Agreement, any variation to the above budget must be executed through a written Change Notice, executed by the Division of HIV and STD Programs' Director and the Contractor. Funds may only be utilized for eligible program expenses. Invoices and cost reports must be submitted and will be paid in accordance with approved line-item detailed budgets.

OPTIONAL, IF EXTENDED

EXHIBIT KK-2
SCOPE OF WORK
March 1, 2026 – August 31, 2026

The Contractor shall achieve the following goals and objectives. Objectives are achieved by following the work plan, composed of implementation and evaluation activities. Activities are to be completed according to the stated time lines and are to be documented as specified.

This section may not list all required ACMS tasks and/or responsibilities. Statements made in this section in no way limit the responsibilities of ACMS and, where conflicts appear with other statements or requirements in this Scope of Work, the statement resulting in the greatest benefit to DHSP should be deemed the binding one.

MEASURABLE OBJECTIVE(S)	IMPLEMENTATION ACTIVITIES	TIMELINE	METHOD(S) OF EVALUATING OBJECTIVE(S) AND DOCUMENTATION
1.0 Provide Systems License Services	1.1 Provide Casewatch Millennium ® System Software Licenses as required by DHSP. License distribution must be approved by DHSP prior to delivery.	Begin 3/1/25 and ongoing through 2/28/26	1.1 DHSP monthly report.
	1.2 Deliver, Install and Upgrade, when applicable, the most current version of the Casewatch Millennium® software for each License distributed.	Begin 3/1/25 and ongoing through 2/28/26	1.2 DHSP monthly report.
	1.3 Conduct License Management activities. - Ensure the number of Licenses distributed coincide with the software deployed. - Ensure Licenses are assigned only when authorized by DHSP. - Ensure all unapproved or unauthorized instances of software are reported to DHSP. - Uninstall and redistribute Licenses that are not utilized for six (6) months or longer. - Track each License distributed. - Report over and under licensing to DHSP.	Begin 3/1/25 and ongoing through 2/28/26	1.3 License management activity documentation will be kept on file and available for DHSP review upon request.
	1.4 Develop and maintain a software license registry and inventory for the Casewatch Millennium®. - Product edition - Product version	Begin 3/1/25 and ongoing through 2/28/26	1.4 License registry and inventory documentation will be kept on file and available for DHSP review upon request.

	- Product release date - Product description		
	1.5 Document License Distribution. - User Name - Location, telephone - Issued Date - Type of user	Begin 3/1/25 and ongoing through 2/28/26	1.5 License documentation will be kept on file and available for DHSP review upon request.
2.0 Provide Data Administration Services	2.1 Provide data administration services as follows, but not limited to:	Begin 3/1/25 and ongoing through 2/28/26	2.1 Database Administration procedures, protocols, and documentation will be kept on file and available for DHSP review upon request.
2A.0 Database Administration	2A.1 Perform all the Database Administration functions for Casewatch.	Begin 3/1/25 and ongoing through 2/28/26	2A.1 Database Administration procedures, protocols, and documentation will be kept on file and available for DHSP review upon request.
	2A.2 Implement data standardization as indicated by DHSP.	Begin 3/1/25 and ongoing through 2/28/26	2A.2 Data standardization documentation will be kept on file and available for DHSP review upon request.
	2A.3 Implement and manage data tune-ups and other DBA tasks. - Perform database tune-ups and synchronization regularly and on schedule. - Create/modify Caché database user accounts. - Record all Cache database modifications and events in log. - Restart the Caché database immediately. Casewatch must be up and running within one hour after crashes or power failures. - Upgrade Caché database regularly and as required.	Begin 3/1/25 and ongoing through 2/28/26	2A.3 Data synchronization documentation will be kept on file and available for DHSP review upon request.
	2B.1 Manage all aspects of database security including, but not limited to:		2B.1 User, logging activities, system rights, intrusion, error logs and

2B.0 Database Security		Begin 3/1/25 and ongoing through 2/28/26	data validation reports will be kept on file and available for DHSP review upon request.
	- Ensure only approved users have access to application system functions and "data" for which they are authorized.		
	- Secure the database from intrusion by hackers. System should generate a message following an attempted security break.		
	- Secure the database "data" from mistakes made by ACMS' development staff, maintenance staff, and production database administrator/s.		
	- Secure the database from all sources of invalid "data" including records imported from the Electronic Data Interchange (EDI) modules and/or other servers, and "data" from other ACMS or DHSP application software.		
	- Secure all data and information provided or processed through or on Casewatch, its various functions/modules, all interfaces (to or from). This has to be (at a minimum) to the specifications required by Governmental Authorities and applicable law.		
	2B.2 Provide and maintain secure login procedures including the following:		2B.2 Security logs will be kept on file and available for DHSP review upon request.
	- Intruder Detection – incorrect login attempts.	Begin 3/1/25 and ongoing through 2/28/26	
	- Password Restrictions – minimum password length, forced periodic changes, unique passwords and limited grace logons.		
	2B.3 Develop and Implement Security Access Control Groups in Casewatch Millennium®.		2B.3 Security Access Control Group documentation will be submitted to DHSP.
	- Security access control group must ensure that authenticated users have access to the functionality and information that they required and are authorized to and no more.	Begin 3/1/25 and ongoing through 2/28/26	
	2C.1 Monitor the database performance.		
	- Perform active monitoring and tracking of database performance, disk size allocation,		

2C.0 Database Maintenance	and overall system (application and database) responsiveness. - Install DBMS upgrades and manage all changes to the database.	Begin 3/1/25 and ongoing through 2/28/26	2C.1 Upgrades and performance documentation will be kept on file and available for DHSP review upon request.
	2D.1 Perform Database Backup and Recovery as indicated by DHSP.		
2D.0 Database Backup and Recovery	- Perform system Backup and Recovery of the Casewatch database and application software. This has to be performed with a documented, tested, and automated method/s and tool/s to ensure fastest recovery and integrity of both the database and the application. - Implement procedures to restore the database by having several ways of recovering the database information. - Implement a disaster recovery plan in coordination with DHSP allowing no more than one hour of system downtime.	Begin 3/1/25 and ongoing through 2/28/26	2D.1 Database recovery plan documentation will be submitted to DHSP. If revisions are made to the recovery plan, such revised portion of the plan must be submitted to DHSP.
	2E.1 Implement and maintain data encryption implementation in Casewatch.		
2E.0 Data Encryption	- At the point where sensitive data first enters the application. - As the data are transmitted between user and the server, EDI processing, and Shadow server. - Where the Casewatch data are stored on a server and database. - Where application data are managed, such as via backup facilities.	Begin 3/1/25 and ongoing through 2/28/26	2E.1 Encryption methodology will be submitted to DHSP.
	2F.1 Provide data conversion and migration services as follows, but not limited to:		
2F.0 Data Conversion and Migration	2F.2 Data Extraction	Begin 3/1/25 and ongoing through 2/28/26	2F.1 Data conversion and migration services will be reported to DHSP.

	- Process data extraction for each of the internal repository sources in the Casewatch Millennium® system. - Provide output files of information containing agreed data components in an agreed structured format (e.g. text delimited, Excel) generated according to an agreed running schedule.	Begin 3/1/25 and ongoing through 2/28/26	2F.2 Data will be extracted and submitted in an agreed structured format to DHSP.
	2F.3 Data Transport - Transport extracted data in a specify form from the source system, Casewatch to DHSP or specify entity for processing, via a temporary storage medium.	Begin 3/1/25 and ongoing through 2/28/26	2F.3 Extracted data will be transported via a storage medium and submitted to DHSP.
3.0 Provide Database Design and Modification Services	3.1 Provide Database Flexibility - Provide the ability for the database and the application system to accommodate all future growth in capacity and capability as new additional requirements come. - Ensure Casewatch database and the application system modules are flexible and easy to use. - Provide high level of flexibility to the Casewatch form, reports, and process flow.	Begin 3/1/25 and ongoing through 2/28/26	3.1 Database flexibility documentation will be kept on file and available for DHSP review upon request.
	3.2 Modify Database Designs - Ensure that the Database modification processes (Add, Delete, or Modify schema) of databases, tables, data sets, and fields is performed without any service interruptions and with relative ease. - Ensure the accuracy of "data" values whenever database modifications are performed. - Provide database model (subschema) and documentations of changes whenever database modifications are performed.	Begin 3/1/25 and ongoing through 2/28/26	3.2 Database design documentation will be kept on file and available for DHSP review upon request.

	- Establish database relationships or methods to ensure database integrity and facilitate future data mining and reporting tools. 3.3 Implement and Maintain Data Integrity - Ensure that the integrity of "data" must be guaranteed and documented with an up to date Database design diagram at all times. - Implement database constraints to enforce new business rules once they are identified by DHSP. - Ensure the accuracy of "data" values whenever data modifications are performed.	Begin 3/1/25 and ongoing through 2/28/26	3.3 Data integrity documentation and reports will be kept on file and available for DHSP review upon request.
4.0 Provide Reporting Services	4.1 Provide User Friendly reporting function and effective report layouts as indicated by DHSP. - All reports are to provide the specified information, and are understandable, legible, and generated and submitted in a 24-hour period.	Begin 3/1/25 and ongoing through 2/28/26	4.1 Letter(s) of DHSP approval and reports will be kept on file.
	4.2 Make reports available for every data element collected in the system. 4.3 Provide the ability for users to view and print reports via local or network printer.	Begin 3/1/25 and ongoing through 2/28/26	4.2 Run any report on any given time based on the data collected from Casewatch. 4.3 Print reports via local or network printer at any given time.
4A.0 Standard Reports	4A.1 Prepare and provide DHSP with access to Standard Casewatch Reports on such dates or at such time intervals and in such format as indicated by DHSP. 4A.2 Remain current at all times on reporting expectations for HRSA, CDC, State-OA, and DHSP. 4A.3 Provide aggregate, comparable, demographic and geographic reports and make accessible and available at any given time.	Begin 3/1/25 and ongoing through 2/28/26 Begin 3/1/25 and ongoing through 2/28/26 Begin 3/1/25 and ongoing through 2/28/26	4A.1 Run Standard reports at any given time. 4A.2 Run HRSA, CDC, and State-OA reports. 4A.3 Run any given aggregate, comparable, demographic, and

	4A.4 Provide very detailed Clients and services level reports and make accessible and available at any given time.	Begin 3/1/25 and ongoing through 2/28/26	geographic report at any given time.
			4A.4 Run any given aggregate, comparable, demographic, and geographic report at any given time.
	4B.1 Provide Ad Hoc reporting capability through a user-friendly graphical interface.	Begin 3/1/25 and ongoing through 2/28/26	
4B.0 Ad Hoc Reports	4B.2 Provide canned reports and make available from a menu.	Begin 3/1/25 and ongoing through 2/28/26	4B.1 Run Ad Hoc reports through the user-friendly graphical interface on a daily, weekly, or monthly basis.
	- Provide the ability to filter the data on each report.	Begin 3/1/25 and ongoing through 2/28/26	4B.2 Run canned reports from the given menu with the applicable filtering on a daily, weekly, or monthly basis.
4C.0 Implement and maintain a Centralized Reporting Graphical User Interface	4C.1 Implement a centralized user-friendly graphical interface that gives the user the full flexibility of the system and the capability to run all reports under one screen, form or menu.		
	- Make available any section specific and/or related field for query.	Begin 3/1/25 and ongoing through 2/28/26	4C.1 Review and test the centralized user-friendly graphical interface in the server. All GUI reporting features documentation will be kept on file and available for DHSP review upon request.
	- Provide the ability to sort data by multiple fields.		
	- Provide the ability to get full print control functions such as, print preview, pagination and layout controls.		
4D.0 Implement Filtering Parameters to the Centralized Reporting GUI	4D.1 Maintain field parameters up-to-date on to the centralized reporting GUI for the following data fields, but not limited to:		
	- Date, Month, Year parameters selection. - Provider and Site parameter selection - SPA parameter selection - Services Category, Sub Category, and Service, - Ethnicity, Age, and Gender parameter selection - Contract Number	Begin 3/1/25 and ongoing through 2/28/26	4D.1 Review and test the parameter selection on user-friendly graphical interface in the report server. All GUI reporting features documentation will be kept on file and available for DHSP review upon request.
	4E.1 Provide shadow server maintenance.		
4E.0 Shadow Server	- Shadow server is to be the exact replica and serve as the full back-up of the Casewatch Millennium®.	Begin 3/1/25 and ongoing through 2/28/26	4E.1 Test shadow server by running various reports and viewing information.

		- Keep server's data up-to-date by replicating Casewatch's data onto the shadow server on a daily basis.		
		- Provide the ability for the shadow server to accommodate all future growth in capacity and capability as new additional requirements are identified.		
		- Shadow server is to be the exact replica of the Casewatch Millennium®.		
5.0	Data Extraction Requirements	5.1 Data extraction requirements for DHSP, State-OA, CDC, and HRSA.		
		5.2 Provide in a predefine format all the data, including historical and archive data, collected in the Casewatch Millennium® and preceding application systems to DHSP electronically via a method indicated by DHSP.	Begin 3/1/25 and ongoing through 2/28/26	5.1 Data set log will be kept on file and available for DHSP to review upon request.
		- All data must be exported as requested by DHSP.	Begin 3/1/25 and ongoing through 2/28/26	5.2 Data set log will be kept on file and available for DHSP to review upon request.
6.0	Provide Application System Modification and Programming Services	6.1 Provide system application modification as needed or as requested by DHSP not to exceed 1,600 programming hours for the term (programming hour cap applies to 6.0, 6.1 and 6.2 together).		
		- Provision for Casewatch changes requested by DHSP, to collect data more efficiently.	Begin 3/1/25 and ongoing through 2/28/26	6.1 DHSP monthly status report.
		6.2 Provide programming support.		
		- Perform Bug fixes and enhancements.		
		6.3 Provide programs modification for the Casewatch's Electronic Data Interface (EDI) module for new agencies as requested by DHSP.	Begin 3/1/25 and ongoing through 2/28/26	6.2 DHSP monthly status report.
7.0	Provide on-going Electronic Data Interchange (EDI) services to Care System providers.	7.1 Support the use of Electronic Data Interchange (EDI) to Care Services providers as indicated by DHSP.	Begin 3/1/25 and ongoing through 2/28/26	6.3 EDI modification documentation will be kept on file and available for DHSP review upon request.
		- Support all inbound/outbound EDI transactions, data standards, code sets and industry		7.1 DHSP monthly status report.

		standards and extension such as, but not limited to CPT4.	Begin 3/1/25 and ongoing through 2/28/26	
	7.2	Perform data validation and apply methods and rules to ensure data quality in the EDI module.		
	7.3	Make available all data imported by the EDI module in all Casewatch modules and functions, including, but not limited to: - Add, Delete, Modify/Editing and reporting	Begin 3/1/25 and ongoing through 2/28/26	7.2 System documentation and logs will be kept on file and available for DHSP review upon request. 7.3 Monthly Electronic generated Casewatch report.
	7.4	Provide the feature to perform interface data maintenances for all Casewatch EDI transmitted data: - Adding, Deleting, Modifying and View/Print.	Begin 3/1/25 and ongoing through 2/28/26	7.4 Maintenance logs will be kept on file and available for DHSP review upon request.
	7.5	Installation of new Electronic Data Interchange (EDI) module must be approved by DHSP prior to initiating work.	Begin 3/1/25 and ongoing through 2/28/26	
8.0 Quality Assurance & Utilization Review of Care Services	8.1	Collaborate with DHSP to maintain a quality assurance system to monitor the quality of Care Services. - Compile data using sampling techniques, statistical analysis and computer resources. - Assist DHSP to analyze and interpret data to determine quality of patient care and to identify problems, patterns, and high-risk activities. - Assist DHSP to disseminates data and results of studies; develop and maintain clinical and administrative records and reporting systems.	Begin 3/1/25 and ongoing through 2/28/26 Begin 3/1/25 and ongoing through 2/28/26	7.5 Letter(s) of DHSP approval and materials will be kept on file. 8.1 Letter(s) of DHSP approval and materials will be kept on file.
8A.0 Casewatch Data Quality Assurance	8A.1	Collaborate with DHSP Data Management to maintain and support Data Quality Assurance tasks. - Collaborate with DHSP in identifying and developing data standards, validation rules, database constraints, and business rules.	Begin 3/1/25 and ongoing through 2/28/26	8A.1 Letter(s) of DHSP approval and materials will be kept on file.

	- Maintain system, module, function, and form level data entry validation rules, database constraints, business rules, and data standards.		
	- The implementation of database and application system validations, database constraints, and business rules must enable rejection of all types of data that don't conform to these rules.		
	- Additionally utilize Data Entry/Maintenance Reports "Error Report" to print data with discrepancies, errors, and problems from a temporary file.		
9.0 Provide Regular System Updates	9.1 Provide application system software updates as needed to all HIV Care Services providers and DHSP.		
	9.2 Install and configure the server software updates and the client software updates to all Providers. ACMS will then train the IT personnel assigned to the project for ongoing client software installations.	Begin 3/1/25 and ongoing through 2/28/26	9.1 DHSP monthly status report.
10.0 Provide Application System Support	10.1 Provide system configuration, installation, and set up support for Casewatch users.	Begin 3/1/25 and ongoing through 2/28/26	9.2 DHSP monthly status report.
	10.2 Provide maintenance for all the Casewatch modules including the following functions: - Adding, Deleting, Modifying, and Programming	Begin 3/1/25 and ongoing through 2/28/26	10.1 DHSP monthly status report.
10A.0 Provide Application Systems Administration	10A.1 Provide application development support to keep the application operating in a changing business & technical environment. - Create/modify Casewatch Application System user accounts. - Record all Application System/Modules modifications and events in log.	Begin 3/1/25 and ongoing through 2/28/26 Begin 3/1/25 and ongoing through 2/28/26	10.2 System documentation, diagrams, and logs will be kept on file and available for DHSP review upon request 10A.1 DHSP monthly status report. System maintenance and modification, user, and event logs will be kept on file and available for DHSP review upon request.

	- Restart the Application System within one hour after panics, crashes, or power failures. - Upgrade Casewatch Application System regularly and as required. 11.1 Casewatch end user support includes, but not limited to: - Provide on-going telephone customer support and help desk coverage. - Return phone calls within thirty minutes. - Provide help desk support and coordinate resolution when a problem arises with the system. - Employ a help-desk system as a tool for managing duties, communicating issues and to generate daily, weekly and monthly log reports. - Implement a triage system for all Casewatch technology needs and inquiries from providers and DHSP. - Provide services from 8:00 A.M. and 5:00 P.M., Monday through Friday, Pacific Time, excluding Los Angeles County legal holidays. 11.1 Resolve Casewatch user problems for all related modules.	Begin 3/1/25 and ongoing through 2/28/26	11.1 DHSP monthly status report.
11.0 Provide End-User Support			
	11.2 Provide Software Support - Install, configure, and setup the Casewatch application, including the installation and updating of drivers and other files necessary to allow the application to work properly on all users' computers. These activities apply to all providers and DHSP on an ongoing basis. 12.1 Migrate new providers to Casewatch.	Begin 3/1/25 and ongoing through 2/28/26 Begin 3/1/25 and ongoing through 2/28/26	11.1 Support log will be kept on file and available for DHSP review upon request. 11.2 DHSP monthly status report.
12.0 Provide Implementation Services			

	12.2 Submit Implementation Plan Submit a written implementation plan showing: - List of tasks - Task duration - Milestones - Resource levels and allocation - Resource levels and allocation ACMS must submit a written plan explaining any possible constraints or deviations to the submitted plan.	Begin 3/1/25 and ongoing through 2/28/26 Begin 3/1/25 and ongoing through 2/28/26	12.1 DHSP monthly status report. 12.2 Implementation Plan will be submitted to DHSP for approval.
	12.3 Install and configure the server software and the client software to all Providers and train the IT personnel assigned to the project for ongoing client software installations.		
13.0 System Documentation	13.1 Provide Casewatch Millennium® Manuals.	Begin 3/1/25 and ongoing through 2/28/26	12.3 Implementation Plan will be submitted to DHSP.
	13.2 Provide User Manual - User Manual must be updated annually or as requested by DHSP. - Determine the effectiveness of the user manual by documenting feedback from users.	Begin 3/1/25 and ongoing through 2/28/26 Begin 3/1/25 and ongoing through 2/28/26	13.1 Manuals will be submitted to DHSP. 13.2 User Manual will be annually submitted to DHSP.
	13.3 Provide Administration and Operations Manual - Manuals must be updated annually or as requested by DHSP.		13.3 Administration and Operations Manuals will be annually submitted to DHSP.
	13.4 Maintain an up-to-date Casewatch's dictionary's data element documentation for all service modules as follows: - Data Element Name - Description - Screen location including a screenshot - Physical Attributes - Validation Rules and Business Rules associated with the data element - Default Values	Begin 3/1/25 and ongoing through 2/28/26 Begin 3/1/25 and ongoing through 2/28/26	13.4 Data element documentation will be kept on file kept and available for DHSP review upon request.

	13.5 Maintain an up-to-date documentation on how the Casewatch's Electronic Data Interface (EDI) module software provides data validation.		
	13.6 Maintain an up-to-date documentation on the methodologies, algorithms, and business rules utilized by the Casewatch's Electronic Data Interface (EDI) module.	Begin 3/1/25 and ongoing through 2/28/26	13.5 EDI's data validation documents will be kept on file and available for DHSP review upon request.
	14.1 Create, update and maintain system dictionaries and tables, including service provider specific fee schedules.	Begin 3/1/25 and ongoing through 2/28/26	13.6 Methodologies, algorithms, and business rules documentation will be kept on file and available for DHSP review upon request.
14.0 Data Dictionary Maintenance	14.2 Provide maintenance of all Casewatch dictionaries including, but not limited to: - Adding, Deleting, Modifying, & Programming	Begin 3/1/25 and ongoing through 2/28/26	14.1 Logs will be kept on file and available for DHSP review upon request. 14.2 System documentation, diagrams, and logs will be kept on file and available for DHSP review upon request.
	15.1 Provide hands-on technical software training to DHSP personnel as needed or as requested by DHSP.	Begin 3/1/25 and ongoing through 2/28/26	
15.0 Provide Training Services	15.2 Provide classroom and hands-on Casewatch application training to provider's end-users and DHSP staff.	Begin 3/1/25 and ongoing through 2/28/26	15.1 DHSP monthly status report. 15.2 Classroom location and capacity report will be submitted to DHSP.
	15.3 Provide up to date training materials to all attendees. - Material must be updated annually or as requested by DHSP	Begin 3/1/25 and ongoing through 2/28/26	15.3 Training materials will be submitted to DHSP.
	15.4 Provide a "Train the Trainer" curriculum with training materials.	Begin 3/1/25 and ongoing through 2/28/26	
	15.5 Provide a training curriculum to be approved by DHSP in writing fifteen (15) days prior to training.	Begin 3/1/25 and ongoing through 2/28/26	15.4 Curriculum will be submitted to DHSP. 15.5 Training curriculum will be submitted to DHSP for approval.
	15.6 Submit a list of available training sessions with content overview.		

	15.7 Submit a training plan for both providers and DHSP personnel.	Begin 3/1/25 and ongoing through 2/28/26	15.6 Training schedule will be submitted to DHSP.
	15.8 Submit examples of the existing training material.	Begin 3/1/25 and ongoing through 2/28/26	15.7 Training plan will be submitted to DHSP.
	15.9 Create monthly training schedule. (Classes will be offered weekly for each service category.)	Begin 3/1/25 and ongoing through 2/28/26	15.8 Existing material will be submitted to DHSP.
	15.10 Distribute class schedule to all providers and DHSP staff at least one month prior to the training.	Begin 3/1/25 and ongoing through 2/28/26	15.9 Monthly schedule will be submitted to DHSP.
	15.11 Conduct enrollment activities.	Begin 3/1/25 and ongoing through 2/28/26	15.10 Monthly schedule will be submitted to DHSP one month prior to the training.
	15.12 Develop a post exam for the end-user trainee on the course content to determine if additional training is needed.	Begin 3/1/25 and ongoing through 2/28/26	15.11 Enrollment logs will be kept on file and available for DHSP review upon request.
	- If needed, re-scheduling of training must be provided.	Begin 3/1/25 and ongoing through 2/28/26	15.12 Incorporate post exam to determine effectiveness of training. Effectiveness documentation, post exams and certifications will be kept on file and available for DHSP review upon request.
	- Provide a certification of completion for trainees who pass the post exam and include a letter recommending a follow-up training every six months.	Begin 3/1/25 and ongoing through 2/28/26	
	15.13 Distribute DHSP's class evaluation, which should be completed by the end-user that attends the class.		15.13 Class evaluations will be submitted to DHSP.
		Begin 3/1/25 and ongoing through 2/28/26	

OPTIONAL, IF EXTENDED

EXHIBIT KK-2
SCOPE OF WORK
March 1, 2026 – August 31, 2026

The Contractor shall achieve the following goals and objectives. Objectives are achieved by following the work plan, composed of implementation and evaluation activities. Activities are to be completed according to the stated time lines and are to be documented as specified.

This section may not list all required ACMS tasks and/or responsibilities. Statements made in this section in no way limit the responsibilities of ACMS and, where conflicts appear with other statements or requirements in this Scope of Work, the statement resulting in the greatest benefit to DHSP should be deemed the binding one.

MEASURABLE OBJECTIVE(S)	IMPLEMENTATION ACTIVITIES	TIMELINE	METHOD(S) OF EVALUATING OBJECTIVE(S) AND DOCUMENTATION
1.0 Provide Systems License Services	1.1 Provide Casewatch Millennium ® System Software Licenses as required by DHSP. License distribution must be approved by DHSP prior to delivery.	Begin 3/1/26 and ongoing through 8/31/26	1.1 DHSP monthly report.
	1.2 Deliver, Install and Upgrade, when applicable, the most current version of the Casewatch Millennium® software for each License distributed.	Begin 3/1/26 and ongoing through 8/31/26	1.2 DHSP monthly report.
	1.3 Conduct License Management activities. - Ensure the number of Licenses distributed coincide with the software deployed. - Ensure Licenses are assigned only when authorized by DHSP. - Ensure all unapproved or unauthorized instances of software are reported to DHSP. - Uninstall and redistribute Licenses that are not utilized for six (6) months or longer. - Track each License distributed. - Report over and under licensing to DHSP.	Begin 3/1/26 and ongoing through 8/31/26	1.3 License management activity documentation will be kept on file and available for DHSP review upon request.
	1.4 Develop and maintain a software license registry and inventory for the Casewatch Millennium®. - Product edition - Product version	Begin 3/1/26 and ongoing through 8/31/26	1.4 License registry and inventory documentation will be kept on file and available for DHSP review upon request.

	- Product release date - Product description		
	1.5 Document License Distribution. - User Name - Location, telephone - Issued Date - Type of user	Begin 3/1/26 and ongoing through 8/31/26	1.5 License documentation will be kept on file and available for DHSP review upon request.
2.0 Provide Data Administration Services	2.1 Provide data administration services as follows, but not limited to:	Begin 3/1/26 and ongoing through 8/31/26	2.1 Database Administration procedures, protocols, and documentation will be kept on file and available for DHSP review upon request.
2A.0 Database Administration	2A.1 Perform all the Database Administration functions for Casewatch.	Begin 3/1/26 and ongoing through 8/31/26	2A.1 Database Administration procedures, protocols, and documentation will be kept on file and available for DHSP review upon request.
	2A.2 Implement data standardization as indicated by DHSP.	Begin 3/1/26 and ongoing through 8/31/26	2A.2 Data standardization documentation will be kept on file and available for DHSP review upon request.
	2A.3 Implement and manage data tune-ups and other DBA tasks. - Perform database tune-ups and synchronization regularly and on schedule. - Create/modify Caché database user accounts. - Record all Cache database modifications and events in log. - Restart the Caché database immediately. Casewatch must be up and running within one hour after crashes or power failures. - Upgrade Caché database regularly and as required.	Begin 3/1/26 and ongoing through 8/31/26	2A.3 Data synchronization documentation will be kept on file and available for DHSP review upon request.
	2B.1 Manage all aspects of database security including, but not limited to:		2B.1 User, logging activities, system rights, intrusion, error logs and

2B.0 Database Security	- Ensure only approved users have access to application system functions and "data" for which they are authorized.	Begin 3/1/26 and ongoing through 28/31/26	data validation reports will be kept on file and available for DHSP review upon request.
	- Secure the database from intrusion by hackers. System should generate a message following an attempted security break.		
	- Secure the database "data" from mistakes made by ACMS' development staff, maintenance staff, and production database administrator/s.		
	- Secure the database from all sources of invalid "data" including records imported from the Electronic Data Interchange (EDI) modules and/or other servers, and "data" from other ACMS or DHSP application software.		
	- Secure all data and information provided or processed through or on Casewatch, its various functions/modules, all interfaces (to or from). This has to be (at a minimum) to the specifications required by Governmental Authorities and applicable law.		
	2B.2 Provide and maintain secure login procedures including the following:		2B.2 Security logs will be kept on file and available for DHSP review upon request.
	- Intruder Detection – incorrect login attempts.	Begin 3/1/26 and ongoing through 8/31/26	
	- Password Restrictions – minimum password length, forced periodic changes, unique passwords and limited grace logons.		
	2B.3 Develop and Implement Security Access Control Groups in Casewatch Millennium®.		2B.3 Security Access Control Group documentation will be submitted to DHSP.
	- Security access control group must ensure that authenticated users have access to the functionality and information that they required and are authorized to and no more.	Begin 3/1/26 and ongoing through 8/31/26	

2C.0 Database Maintenance	2C.1 Monitor the database performance. - Perform active monitoring and tracking of database performance, disk size allocation, and overall system (application and database) responsiveness. - Install DBMS upgrades and manage all changes to the database.	Begin 3/1/26 and ongoing through 28/3126	2C.1 Upgrades and performance documentation will be kept on file and available for DHSP review upon request.
2D.0 Database Backup and Recovery	2D.1 Perform Database Backup and Recovery as indicated by DHSP. - Perform system Backup and Recovery of the Casewatch database and application software. This has to be performed with a documented, tested, and automated method/s and tool/s to ensure fastest recovery and integrity of both the database and the application. - Implement procedures to restore the database by having several ways of recovering the database information. - Implement a disaster recovery plan in coordination with DHSP allowing no more than one hour of system downtime.	Begin 3/1/26 and ongoing through 8/31/26	2D.1 Database recovery plan documentation will be submitted to DHSP. If revisions are made to the recovery plan, such revised portion of the plan must be submitted to DHSP.
2E.0 Data Encryption	2E.1 Implement and maintain data encryption implementation in Casewatch. - At the point where sensitive data first enters the application. - As the data are transmitted between user and the server, EDI processing, and Shadow server. - Where the Casewatch data are stored on a server and database. - Where application data are managed, such as via backup facilities.	Begin 3/1/26 and ongoing through 8/31/26	2E.1 Encryption methodology will be submitted to DHSP.
2F.0 Data Conversion and Migration	2F.1 Provide data conversion and migration services as follows, but not limited to:	Begin 3/1/26 and ongoing through 8/31/26	2F.1 Data conversion and migration services will be reported to DHSP.

	2F.2 Data Extraction		**2F.2** Data will be extracted and submitted in an agreed structured format to DHSP.
	- Process data extraction for each of the internal repository sources in the Casewatch Millennium® system.	Begin 3/1/26 and ongoing through 8/31/26	
	- Provide output files of information containing agreed data components in an agreed structured format (e.g. text delimited, Excel) generated according to an agreed running schedule.		
	2F.3 Data Transport		
	- Transport extracted data in a specify form from the source system, Casewatch to DHSP or specify entity for processing, via a temporary storage medium.	Begin 3/1/26 and ongoing through 8/31/26	**2F.3** Extracted data will be transported via a storage medium and submitted to DHSP.
3.0 Provide Database Design and Modification Services	**3.1** Provide Database Flexibility		
	- Provide the ability for the database and the application system to accommodate all future growth in capacity and capability as new additional requirements come.	Begin 3/1/26 and ongoing through 28/31/26	**3.1** Database flexibility documentation will be kept on file and available for DHSP review upon request.
	- Ensure Casewatch database and the application system modules are flexible and easy to use.		
	- Provide high level of flexibility to the Casewatch form, reports, and process flow.		
	3.2 Modify Database Designs		
	- Ensure that the Database modification processes (Add, Delete, or Modify schema) of databases, tables, data sets, and fields is performed without any service interruptions and with relative ease.	Begin 3/1/26 and ongoing through 8/31/26	**3.2** Database design documentation will be kept on file and available for DHSP review upon request.
	- Ensure the accuracy of "data" values whenever database modifications are performed.		
	- Provide database model (subschema) and documentations of changes whenever database modifications are performed.		

	- Establish database relationships or methods to ensure database integrity and facilitate future data mining and reporting tools. 3.3 Implement and Maintain Data Integrity - Ensure that the integrity of "data" must be guaranteed and documented with an up to date Database design diagram at all times. - Implement database constraints to enforce new business rules once they are identified by DHSP. - Ensure the accuracy of "data" values whenever data modifications are performed.	Begin 3/1/26 and ongoing through 8/31/26	3.3 Data integrity documentation and reports will be kept on file and available for DHSP review upon request.
4.0 Provide Reporting Services	4.1 Provide User Friendly reporting function and effective report layouts as indicated by DHSP. - All reports are to provide the specified information, and are understandable, legible, and generated and submitted in a 24-hour period. 4.2 Make reports available for every data element collected in the system. 4.3 Provide the ability for users to view and print reports via local or network printer.	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	4.1 Letter(s) of DHSP approval and reports will be kept on file. 4.2 Run any report on any given time based on the data collected from Casewatch. 4.3 Print reports via local or network printer at any given time.
4A.0 Standard Reports	4A.1 Prepare and provide DHSP with access to Standard Casewatch Reports on such dates or at such time intervals and in such format as indicated by DHSP. 4A.2 Remain current at all times on reporting expectations for HRSA, CDC, State-OA, and DHSP. 4A.3 Provide aggregate, comparable, demographic and geographic reports and make accessible and available at any given time.	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	4A.1 Run Standard reports at any given time. 4A.2 Run HRSA, CDC, and State-OA reports. 4A.3 Run any given aggregate, comparable, demographic, and

	4A.4	Provide very detailed Clients and services level reports and make accessible and available at any given time.	Begin 3/1/26 and ongoing through 8/31/26	geographic report at any given time.
				4A.4 Run any given aggregate, comparable, demographic, and geographic report at any given time.
4B.0 Ad Hoc Reports	4B.1	Provide Ad Hoc reporting capability through a user-friendly graphical interface.	Begin 3/1/26 and ongoing through 8/31/26	
				4B.1 Run Ad Hoc reports through the user-friendly graphical interface on a daily, weekly, or monthly basis.
	4B.2	Provide canned reports and make available from a menu. - Provide the ability to filter the data on each report.	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	4B.2 Run canned reports from the given menu with the applicable filtering on a daily, weekly, or monthly basis.
4C.0 Implement and maintain a Centralized Reporting Graphical User Interface	4C.1	Implement a centralized user-friendly graphical interface that gives the user the full flexibility of the system and the capability to run all reports under one screen, form or menu. - Make available any section specific and/or related field for query. - Provide the ability to sort data by multiple fields. - Provide the ability to get full print control functions such as, print preview, pagination and layout controls.	Begin 3/1/26 and ongoing through 8/31/26	4C.1 Review and test the centralized user-friendly graphical interface in the server. All GUI reporting features documentation will be kept on file and available for DHSP review upon request.
4D.0 Implement Filtering Parameters to the Centralized Reporting GUI	4D.1	Maintain field parameters up-to-date on to the centralized reporting GUI for the following data fields, but not limited to: - Date, Month, Year parameters selection. - Provider and Site parameter selection - SPA parameter selection - Services Category, Sub Category, and Service, - Ethnicity, Age, and Gender parameter selection - Contract Number	Begin 3/1/26 and ongoing through 8/31/26	4D.1 Review and test the parameter selection on user-friendly graphical interface in the report server. All GUI reporting features documentation will be kept on file and available for DHSP review upon request.
4E.0 Shadow Server	4E.1	Provide shadow server maintenance. - Shadow server is to be the exact replica and serve as the full back-up of the Casewatch Millennium®.	Begin 3/1/26 and ongoing through 8/31/26	4E.1 Test shadow server by running various reports and viewing information.

		- Keep server's data up-to-date by replicating Casewatch's data onto the shadow server on a daily basis.		
		- Provide the ability for the shadow server to accommodate all future growth in capacity and capability as new additional requirements are identified.		
		- Shadow server is to be the exact replica of the Casewatch Millennium®.		
5.0	Data Extraction Requirements	5.1 Data extraction requirements for DHSP, State-OA, CDC, and HRSA.		5.1 Data set log will be kept on file and available for DHSP to review upon request.
		5.2 Provide in a predefine format all the data, including historical and archive data, collected in the Casewatch Millennium® and preceding application systems to DHSP electronically via a method indicated by DHSP.	Begin 3/1/26 and ongoing through 8/31/26	5.2 Data set log will be kept on file and available for DHSP to review upon request.
		- All data must be exported as requested by DHSP.	Begin 3/1/26 and ongoing through 8/31/26	
7.0	Provide Application System Modification and Programming Services	6.1 Provide system application modification as needed or as requested by DHSP not to exceed 1,600 programming hours for the term (programming hour cap applies to 6.0, 6.1 and 6.2 together).		6.1 DHSP monthly status report.
		- Provision for Casewatch changes requested by DHSP, to collect data more efficiently.	Begin 3/1/26 and ongoing through 8/31/26	
		6.2 Provide programming support.		6.2 DHSP monthly status report.
		- Perform Bug fixes and enhancements.	Begin 3/1/26 and ongoing through 8/31/26	
		6.3 Provide programs modification for the Casewatch's Electronic Data Interface (EDI) module for new agencies as requested by DHSP.		6.3 EDI modification documentation will be kept on file and available for DHSP review upon request.
			Begin 3/1/26 and ongoing through 8/31/26	
7.0	Provide on-going Electronic Data Interchange (EDI) services to Care System providers.	7.1 Support the use of Electronic Data Interchange (EDI) to Care Services providers as indicated by DHSP.		7.1 DHSP monthly status report.
		- Support all inbound/outbound EDI transactions, data standards, code sets and industry	Begin 3/1/26 and ongoing through 8/31/26	

		standards and extension such as, but not limited to CPT4.	
	7.2	Perform data validation and apply methods and rules to ensure data quality in the EDI module.	7.2 System documentation and logs will be kept on file and available for DHSP review upon request.
	7.3	Make available all data imported by the EDI module in all Casewatch modules and functions, including, but not limited to:	Begin 3/1/26 and ongoing through 8/31/26
		- Add, Delete, Modify/Editing and reporting	Begin 3/1/26 and ongoing through 8/31/26
	7.4	Provide the feature to perform interface data maintenances for all Casewatch EDI transmitted data:	7.4 Maintenance logs will be kept on file and available for DHSP review upon request.
		- Adding, Deleting, Modifying and View/Print.	Begin 3/1/26 and ongoing through 8/31/26
	7.5	Installation of new Electronic Data Interchange (EDI) module must be approved by DHSP prior to initiating work.	7.5 Letter(s) of DHSP approval and materials will be kept on file.
8.0 Quality Assurance & Utilization Review of Care Services	8.1	Collaborate with DHSP to maintain a quality assurance system to monitor the quality of Care Services.	Begin 3/1/26 and ongoing through 8/31/26 8.1 Letter(s) of DHSP approval and materials will be kept on file.
		- Compile data using sampling techniques, statistical analysis and computer resources.	Begin 3/1/26 and ongoing through 8/31/26
		- Assist DHSP to analyze and interpret data to determine quality of patient care and to identify problems, patterns, and high-risk activities.	
		- Assist DHSP to disseminates data and results of studies; develop and maintain clinical and administrative records and reporting systems.	
8A.0 Casewatch Data Quality Assurance	8A.1	Collaborate with DHSP Data Management to maintain and support Data Quality Assurance tasks.	8A.1 Letter(s) of DHSP approval and materials will be kept on file.
		- Collaborate with DHSP in identifying and developing data standards, validation rules, database constraints, and business rules.	Begin 3/1/26 and ongoing through 8/31/26

	- Maintain system, module, function, and form level data entry validation rules, database constraints, business rules, and data standards. - The implementation of database and application system validations, database constraints, and business rules must enable rejection of all types of data that don't conform to these rules. - Additionally utilize Data Entry/Maintenance Reports "Error Report" to print data with discrepancies, errors, and problems from a temporary file.		
9.0 Provide Regular System Updates	9.1 Provide application system software updates as needed to all HIV Care Services providers and DHSP.		9.1 DHSP monthly status report.
	9.2 Install and configure the server software updates and the client software updates to all Providers. ACMS will then train the IT personnel assigned to the project for ongoing client software installations.	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	9.2 DHSP monthly status report.
10.0 Provide Application System Support	10.1 Provide system configuration, installation, and set up support for Casewatch users.		10.1 DHSP monthly status report.
	10.2 Provide maintenance for all the Casewatch modules including the following functions: - Adding, Deleting, Modifying, and Programming	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	10.2 System documentation, diagrams, and logs will be kept on file and available for DHSP review upon request
10A.0 Provide Application Systems Administration	10A.1 Provide application development support to keep the application operating in a changing business & technical environment. - Create/modify Casewatch Application System user accounts. - Record all Application System/Modules modifications and events in log.	Begin 3/1/26 and ongoing through 8/31/26	10A.1 DHSP monthly status report. System maintenance and modification, user, and event logs will be kept on file and available for DHSP review upon request.

	- Restart the Application System within one hour after panics, crashes, or power failures. - Upgrade Casewatch Application System regularly and as required.		11.1 DHSP monthly status report.
11.0 Provide End-User Support	11.1 Casewatch end user support includes, but not limited to: - Provide on-going telephone customer support and help desk coverage. - Return phone calls within thirty minutes. - Provide help desk support and coordinate resolution when a problem arises with the system. - Employ a help-desk system as a tool for managing duties, communicating issues and to generate daily, weekly and monthly log reports. - Implement a triage system for all Casewatch technology needs and inquiries from providers and DHSP. - Provide services from 8:00 A.M. and 5:00 P.M., Monday through Friday, Pacific Time, excluding Los Angeles County legal holidays.	Begin 3/1/26 and ongoing through 8/31/26	
	11.1 Resolve Casewatch user problems for all related modules.		11.1 Support log will be kept on file and available for DHSP review upon request.
	11.2 Provide Software Support - Install, configure, and setup the Casewatch application, including the installation and updating of drivers and other files necessary to allow the application to work properly on all users' computers. These activities apply to all providers and DHSP on an ongoing basis.	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	11.2 DHSP monthly status report.
12.0 Provide Implementation Services	12.1 Migrate new providers to Casewatch.		12.1 DHSP monthly status report.

	12.2 Submit Implementation Plan Submit a written implementation plan showing: - List of tasks - Task duration - Milestones - Resource levels and allocation - Resource levels and allocation ACMS must submit a written plan explaining any possible constraints or deviations to the submitted plan.	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	12.2 Implementation Plan will be submitted to DHSP for approval.
	12.3 Install and configure the server software and the client software to all Providers and train the IT personnel assigned to the project for ongoing client software installations.		12.3 Implementation Plan will be submitted to DHSP.
13.0 System Documentation	13.1 Provide Casewatch Millennium® Manuals.	Begin 3/1/26 and ongoing through 8/31/26	13.1 Manuals will be submitted to DHSP.
	13.2 Provide User Manual - User Manual must be updated annually or as requested by DHSP. - Determine the effectiveness of the user manual by documenting feedback from users.	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	13.2 User Manual will be annually submitted to DHSP.
	13.3 Provide Administration and Operations Manual - Manuals must be updated annually or as requested by DHSP. 13.4 Maintain an up-to-date Casewatch's dictionary's data element documentation for all service modules as follows: - Data Element Name - Description - Screen location including a screenshot - Physical Attributes - Validation Rules and Business Rules associated with the data element - Default Values	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	13.3 Administration and Operations Manuals will be annually submitted to DHSP. 13.4 Data element documentation will be kept on file kept and available for DHSP review upon request.

	Requirement	Timeline	Deliverable
	13.5 Maintain an up-to-date documentation on how the Casewatch's Electronic Data Interface (EDI) module software provides data validation.		13.5 EDI's data validation documents will be kept on file and available for DHSP review upon request.
	13.6 Maintain an up-to-date documentation on the methodologies, algorithms, and business rules utilized by the Casewatch's Electronic Data Interface (EDI) module.	Begin 3/1/26 and ongoing through 8/31/26	13.6 Methodologies, algorithms, and business rules documentation will be kept on file and available for DHSP review upon request.
	14.1 Create, update and maintain system dictionaries and tables, including service provider specific fee schedules.	Begin 3/1/26 and ongoing through 8/31/26	14.1 Logs will be kept on file and available for DHSP review upon request.
14.0 Data Dictionary Maintenance	14.2 Provide maintenance of all Casewatch dictionaries including, but not limited to: - Adding, Deleting, Modifying, & Programming	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	14.2 System documentation, diagrams, and logs will be kept on file and available for DHSP review upon request. 15.1 DHSP monthly status report.
	15.1 Provide hands-on technical software training to DHSP personnel as needed or as requested by DHSP.		
16.0 Provide Training Services	15.2 Provide classroom and hands-on Casewatch application training to provider's end-users and DHSP staff.	Begin 3/1/26 and ongoing through 8/31/26	15.2 Classroom location and capacity report will be submitted to DHSP.
	15.3 Provide up to date training materials to all attendees. - Material must be updated annually or as requested by DHSP	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	15.3 Training materials will be submitted to DHSP.
	15.4 Provide a "Train the Trainer" curriculum with training materials.		15.4 Curriculum will be submitted to DHSP.
	15.5 Provide a training curriculum to be approved by DHSP in writing fifteen (15) days prior to training.	Begin 3/1/26 and ongoing through 8/31/26	15.5 Training curriculum will be submitted to DHSP for approval.
	15.6 Submit a list of available training sessions with content overview.	Begin 3/1/26 and ongoing through 8/31/26	15.6 Training schedule will be submitted to DHSP.

	15.7 Submit a training plan for both providers and DHSP personnel.	Begin 3/1/26 and ongoing through 8/31/26	15.7 Training plan will be submitted to DHSP.
	15.8 Submit examples of the existing training material.	Begin 3/1/26 and ongoing through 8/31/26	15.8 Existing material will be submitted to DHSP.
	15.9 Create monthly training schedule. (Classes will be offered weekly for each service category.)	Begin 3/1/26 and ongoing through 8/31/26	15.9 Monthly schedule will be submitted to DHSP.
	15.10 Distribute class schedule to all providers and DHSP staff at least one month prior to the training.	Begin 3/1/26 and ongoing through 8/31/26	15.10 Monthly schedule will be submitted to DHSP one month prior to the training.
	15.11 Conduct enrollment activities.	Begin 3/1/26 and ongoing through 8/31/26	15.11 Enrollment logs will be kept on file and available for DHSP review upon request.
	15.12 Develop a post exam for the end-user trainee on the course content to determine if additional training is needed. - If needed, re-scheduling of training must be provided. - Provide a certification of completion for trainees who pass the post exam and include a letter recommending a follow-up training every six months. 15.13 Distribute DHSP's class evaluation, which should be completed by the end-user that attends the class.	Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26 Begin 3/1/26 and ongoing through 8/31/26	15.12 Incorporate post exam to determine effectiveness of training. Effectiveness documentation, post exams and certifications will be kept on file and available for DHSP review upon request. 15.13 Class evaluations will be submitted to DHSP.