DRAFT

AMENDMENT TO SERVICE AGREEMENT

Fulton County Department for HIV Elimination Service Agreement eCOMPAS Maintenance and Licensing Agreement

RE: Contract Number: FC 23-02

Summary

RDE System Support Group, LLC (RDE), with its principal place of business at 44 Cedar Cliff Drive, Wayne, NJ and Fulton County (the County, Customer), with its principal place of business at 137 Peachtree Street Atlanta, Georgia 30303, entered into an Agreement dated July 15, 2020 and titled Atlanta Eligible Metropolitan Area Agreement (the 2020 Agreement), to enable Customer to utilize RDE's eCOMPAS[tm] (electronic Comprehensive Outcomes Measurement Program for Accountability and Success) platform. Customer utilizes eCOMPAS to serve the data collection, monitoring, and analysis needs of the Ryan White programs managed by the Department for HIV Elimination. The parties executed an agreement titled Fulton County Department for HIV Elimination eCOMPAS Maintenance and Licensing Agreement - Service Agreement (the 2023 Service Agreement), effective March 1, 2023, to extend the term of the 2020 Agreement for the period from March 1, 2023 through February 29, 2024. The parties now wish to amend the 2023 Service Agreement to include certain Deliverables, as described in greater detail below.

The term of this Amendment is from October 1, 2023 through December 31, 2023, to run concurrently with the Renewal Term, as defined in the 2023 Service Agreement, March 1, 2023 through February 29, 2024.

Scope of Work (SOW)

RDE will provide eCOMPAS pursuant to its Software as a Service (SaaS) model, which includes all licensing, maintenance and technical assistance for the duration of the term. Licensing, maintenance, and technical assistance will be provided on a daily basis and will be billable in accordance with the Deliverables and Payment schedule attached hereto as Attachment A.

Licensing covers the use of eCOMPAS (also known as e2Fulton) by Customer, to enter and report client level data for the duration of this agreement.

Maintenance includes upgrading the system to meet new HRSA federal reporting requirements. Additional items included in Maintenance are described in the Scope of Work attached hereto as Attachment A.

Technical assistance includes responding to user questions and requests from stakeholders to enable them to use the system to meet the functionality as implemented at system launch.

RDE will provide help desk services from 9:00 AM to 5:00 PM EST at:

Tel: (973) 773-0244
Email: support@e2fulton.org

The Project Scope attached hereto in Attachment A will provide the basis for the development of detailed final Specifications at the commencement of the Project. The development of final Specifications may result in mutually agreed upon revisions to the Project Scope, and the development of the Project and the implementation plan for the Project will be based on and defined by the final Specifications.

New software development requests outside of regular maintenance and special requests (such as researching data discrepancies caused by user error) may require negotiating and executing a Change Order. RDE often performs these special requests for free, however this will not guarantee all such requests will be free of charge.

Deliverables and Payment Schedule

The license fees for the eCOMPAS Software as a Service (SaaS) licenses total $434,150.00. The above fees will be invoiced and payments will be made in accordance with the following Deliverables and Payment Schedule. The Deliverables and Payment Schedule also includes the amount of $65,000 for Prepaid Incentives for the Client Satisfaction Survey and Consumer Needs Assessment, which will be disbursed by RDE on behalf of the County.

Deliverable	Estimated Date	Amount
Software as a Service (SaaS) License for e2Fulton. System Modifications and Enhancements – Contract Management and Fiscal.	Upon Execution of Service Agreement Estimated: October 20, 2023	$8,000.00
Software as a Service (SaaS) License for e2Fulton. System Modifications and Enhancements – Non-Fiscal.	Upon Execution of Service Agreement Estimated: October 20, 2023	$191,800.00
Software as a Service (SaaS) License for e2Fulton. New System Enhancements for 2023 (Phase 1). Contract Management and Fiscal. Project Start-up, Delivery of Prototypes.	Estimated: November 20, 2023	$4,800.00
Software as a Service (SaaS) License for e2Fulton. New System Enhancements for 2023 and 2024 (Phases 1, 2 and 3). Contract Management and Fiscal. Project Start-up.	Upon Execution of Service Agreement Estimated: October 20, 2023	$38,100.00
Software as a Service (SaaS) License for e2Fulton. New System Enhancements for 2023 (Phase 1). Non-Fiscal. Project Start-up, Delivery of Prototypes.	Estimated: November 20, 2023	$40,950.00

Software as a Service (SaaS) License for e2Fulton. New System Enhancements for 2023 and 2024 (Phases 1, 2 and 3). Non-Fiscal. Project Start-up.	Upon Execution of Service Agreement Estimated: October 20, 2023	$50,500.00
Software as a Service (SaaS) License for e2Fulton. Part C Capacity Development Grant Project Components. Project Start-up, Development of Detailed Specifications.	Upon Execution of Service Agreement Estimated: December, 2023	$60,000.00
Software as a Service (SaaS) License for e2Fulton. Year-end System Modifications.	Estimated: TBD	$40,000.00
Prepaid Incentives for Client Satisfaction Survey and Consumer Needs Assessment.	Upon Execution of Service Agreement Estimated: October 20, 2023	$ 65,000.00
TOTAL		$434,150

The above-listed Deliverables are described in greater detail in the Deliverables Schedule and Project Scope of Work attached hereto as Attachment A.

Terms

1. All data entered into the system by users is owned by Customer or to whomever Customer grants ownership rights.

2. eCOMPAS, e2, and e2Fulton are copyrighted works of RDE, and all systems and future modifications are wholly owned by RDE.

3. Invoices will be submitted to Customer upon deliverables completion, or within three weeks after the Estimated Date, whichever is sooner. Payment is due within 30 days of submission.

4. Usage of the system implies Customer understands the security and privacy measures as defined in Security and Privacy section and attests that these are sufficient to meet all relevant local and national laws and regulations. Customer, its users, and its agents will not take any actions which negate or circumvent those security and privacy measures.

Customer Responsibilities for Project Success

RDE assumes Customer will engage in the joint-team approach and use good judgment in working flexibly to engage stakeholders to do what is necessary to help ensure project success. For example, certain policies, such as the requirements to submit reports by certain dates, help ensure data integrity can only be promulgated by the Customer, and not by RDE.

Both parties accept the following additional responsibilities:

1. Customer will provide detailed written requirements for additional development and customization requests with clarification as needed, including written specifications, and desired time frames for delivery of prototype, testing, and deployment, in accordance with procedures to be mutually agreed upon between Customer and RDE.

2. Customer will test all prototypes delivered, in accordance with the procedures to be mutually agreed upon between Customer and RDE and will verify that new customizations are in conformance with final specifications and are working from a program standpoint. Testing and verification is a joint-team process; however, it is customer's responsibility to identify and report to RDE in writing, following review and testing, any non-conformance of delivered prototypes from final specifications. RDE will expedite resolving any issues that are identified, with the understanding that any changes requested that are not described in final specifications will be considered requests for new development. Written requirements from Customer may take the form of detailed meeting minutes taken by RDE.

3. RDE will stay apprised of all HRSA reporting requirements and eligibility changes or suggestion; RDE will implement those updates with Customer approval. Customer will hear and consider recommendations on policy changes to help enhance user acceptance and data integrity.

4. Customer and RDE will comply with all relevant laws and regulations

5. Customer will ensure that its technology infrastructure meets the current minimum system requirements provided by RDE, for the proper functionality and performance of e2Fulton.

6. Customer will provide written guidance if performance falls below contracted levels or expectation with sufficient time for corrective action to be implemented, tested, and deployed. In the absence of an agreed upon timeframe, sixty (60) days will be granted for corrective actions.

7. Customer understands that uniquely customized software can be a product of incomplete, conflicting, or inaccurate system specifications, and software errors are to be expected. Customer understands that successful custom software projects require clear specifications, testing by both RDE and the client team, clear and timely documented feedback from users and stakeholders, good joint project management, time buffers for unforeseen issues, and proper, proactive expectation-setting. Good practices among project partners produce good project outcomes.

8. Customer and its agents will not copy or attempt to reverse engineer eCOMPAS or any related applications.

9. Additional assumptions and responsibilities of Customer or RDE Systems may be added or amended with the written consent of both the Customer and RDE.

Procedures for New Project Requests and Project Approval

The Parties agree that new development projects will be proposed, reviewed and approved according to the following procedure:

- Upon receipt of a written request from Customer for a new project or upon receipt of written requirements, RDE will consult with Customer to develop a written Scope of Work for the project. The written request from Customer may take the form of written approval of meeting minutes which include a detailed description of the request.

- RDE will submit a written draft Scope of Work for the project for Customer's review.
- Authorized representatives of Customer, in their sole discretion, will provide RDE with written approval of the draft Scope of Work and desired completion date for the project.
- Upon receipt of Customer's written approval of the draft Scope of Work RDE will consult with Customer to develop Detailed Specifications, a Project Timeline, and a Deliverables Schedule for the Project.
- RDE will submit the Detailed Specifications, Project Timeline, Deliverables Schedule, and cost estimate for the project for Customer's approval.
- Authorized representatives of Customer, in their sole discretion, will provide RDE with written approval of the Detailed Specifications, Project Timeline, Deliverables Schedule and cost estimate before RDE begins work on the project.
- In the case of minor system changes, which do not require planning, design or extensive new development work, the parties may mutually agree to proceed on the basis of a written cost estimate and written approval, without the submission and review of a project Scope of Work, Detailed Specification, and Project Timeline.
- If the project is to be included in a contract, contract amendment, or change order, the Scope of Work for the project, as approved by Customer, will be appended to the service agreement, service agreement amendment, or change order as the Service Agreement Scope of Work (Attachment A).

As part of the scope development, project planning and specification development process for a project, RDE may provide to Customer one or more demonstrations (demos) of features or modules from other eCOMPAS or e2 systems. It is understood that the purpose of these demos is to provide Customer with options for new system features and are not a guarantee that all features included in demos will be included in the project. It is the responsibility of Customer to carefully review the Scope of Work and draft Specifications to ensure that all desired features are included in the Scope of Work and Specifications for the project.

If the Deliverables Schedule provided above in the section Deliverables and Payment Schedule, or the detailed Deliverables Schedule included in Attachment A, include a deliverable for Mid-year System Modifications or Year-end System Modifications, a cost estimate that is approved in accordance with the above procedure may be invoiced against the remaining balance in that deliverable at the Customer's option.

Security and Privacy

Data Security and Privacy is promoted through several mechanisms:

1. **Encryption.** Data is encrypted both during transmission and while at rest. When data is transmitted, the highest level of data encryption for secure data transmission will be used (256-bit SSL). Sensitive data (Level 1 data), including clients' full names, social security numbers, addresses, and other client identifiers, and secure messages, are encrypted at rest using advanced LKM encryption.

2. **Usernames/Passwords.** Username and strong password security with expiring passwords, and failed-attempt blocking.

3. **User-Level Security.** Different user groups and users may have access to certain data elements, screens, reports and functions.

4. **Advanced Security for Services.** Certain service categories can be further restricted from sharing (e.g., Legal, Mental Health and Substance Abuse Services).

5. **Audit Trail.** Audit trail logging tracks changes to data made by any user. Access logging tracks users who have accessed the "looked up" features of data records.

6. **IP Address Logging.** IP address logging tracks which computer a user used to access eCOMPAS.

7. **Continuous Security Updates.** To ensure future security, security and confidentiality procedures force security policies, plans, and technology to be continuously reviewed and updated.

8. **Confidential Security Measures.** For security purposes, there are other confidentiality and security measures in place that cannot be disclosed.

Mutual Non-Disclosure

Each party (the Disclosing Party) may disclose to the other party (the Receiving Party) information that is confidential or proprietary (Confidential Information). Confidential Information includes information and materials related to the business, affairs and/or procedures of the Disclosing Party, or to the designs, programs, flowcharts and documentation of the Disclosing Party's information technology. Confidential Information does not include any information that is: (a) in or enters into the public domain through no wrongful act of the Receiving Party; (b) rightfully received from a third party without restriction and without breach of this Agreement; or (c) already in the Receiving Party's possession as evidenced by its records and not the subject of a separate nondisclosure agreement.

The Receiving Party will not, and will cause each of its employees, agents, subcontractors and Affiliates not to, either during or after the term of this Agreement: (a) disclose any Confidential Information to any third party (except as required by applicable law, regulation or legal process, but only after compliance with this Section 6.2) or to any employee, agent, subcontractor or Affiliate of the Receiving Party other than on a "need to know" basis; or (b) use Confidential Information for any purpose other than in the performance of this Agreement. The Receiving Party will hold in confidence the Confidential Information and will use Confidential Information solely to perform its obligations under this Agreement. The Receiving Party will take all reasonable precautions necessary to safeguard the Disclosing Party's property, including Confidential Information. Upon the Disclosing Party's request, the Receiving Party will return all Confidential Information. In the event that the Receiving Party or any of its employees, agents, subcontractors or Affiliates is required by applicable law, regulation or legal process to disclose any Confidential Information, the Receiving Party will (a) disclose such Confidential Information only to the extent its legal counsel determines such disclosure is required; (b) notify the Disclosing Party immediately so that the Disclosing Party may seek a protective order or other appropriate remedy; and (c) exercise all reasonable efforts to obtain assurance that confidential treatment will be accorded to such Confidential Information.

HIPAA Compliance Procedures

Both parties agree to comply with the Health Insurance Portability and Accountability Act of 1996, Pub. L. No. 104 191, and the rules and regulations promulgated thereunder, as the same may be amended and supplemented from time to time, including the amendments enacted by the Health Information Technology for Economic and Clinical Health Act, Title XIII of the American Recovery and Reinvestment Act of 2009 (the HITECH Act) (collectively referred to herein as "HIPAA").

The parties recognize a common goal of securing the integrity of all individually identifiable health information (IIHI) and according IIHI the highest possible degree of confidentiality and protection from disclosure. The parties will use their best efforts to maintain the security and confidentiality of all IIHI in their possession in connection with the activities contemplated by this Agreement, and to protect the IIHI from disclosure. All IIHI (including information relating to patients and/or study subjects whose identities may be ascertained by the exercise of reasonable effort through investigation or through use of other public or private databases) shall be treated as confidential by the parties in accordance with all applicable federal, state and local laws, rules and regulations governing the confidentiality and privacy of individually identifiable health information, including, but without limitation, to the extent that each party is subject to it, HIPAA; and the parties agree to take such additional steps as may be required to ensure that the parties are and remain in compliance with HIPAA and official guidance.

General Terms

Assignment. Neither party may assign this Agreement or any of its rights or obligations hereunder without the other party's prior written consent.

Entire Agreement; Amendments. The provisions, terms and conditions of this Agreement (including its schedules and attachments) represent the entire agreement of the parties with regard to the subject matter of this Agreement and except as expressly provided, supersede any prior oral or written matter not included herein. No waiver, modification, change or amendment of any of the provisions of this Agreement shall be valid unless in writing and signed by the party against whom such claimed waiver, modification, change or amendment is sought to be enforced. Failure to enforce any provision of this Agreement shall not constitute a waiver of any term hereof.

Standard limitation of liability. RDE will not be liable for any consequential, indirect, special, punitive or incidental damages or lost revenues based on Customer's claims or those of its subrecipients including, but not limited to, claims for loss of data, goodwill, use of the software, interruption in use or availability of data, stoppage of other work or impairment of other assets), arising out of breach or failure of express or implied warranty, breach of contract, misrepresentation, negligence, strict liability in tort or otherwise. RDE's maximum liability during the term of this agreement for damages in connection with a claim related to this agreement, regardless of the cause of action, will not exceed the sum total of the amounts paid by Customer to RDE in the preceding twelve (12) months..

Standard limited warranty. All warranties, conditions, representations, indemnities and guarantees with respect to the products, whether express or implied, arising by law, custom, prior oral or written statements by RDE, its licensors or representatives or otherwise (including, but not limited to any warranty of merchantability, satisfaction and fitness for a particular purpose) are hereby overridden, excluded and disclaimed. Without limiting the foregoing, RDE makes no representations or warranties regarding the accuracy, completeness or quality of Customer's historic data, whether before or after migration, or the suitability of such data for migration to eCOMPAS, and makes no representations or warranties with respect to the success or completeness of the data migration from Customer's legacy data system to eCOMPAS. RDE makes no representations or warranties regarding the completeness or accuracy of detailed specifications for the Project provided by or signed off on by KDHE, or the fitness for a particular purpose of software developed in conformity with such specifications.

Indemnities. For purposes of this Agreement, the obligation of KDHE to indemnify RDE will be limited as provided in Section 4 of Appendix A. RDE agrees to indemnify, and hold harmless KDHE and its employees from and against any and all direct claims, losses, damages, liabilities, and expenses (including, but not limited to, reasonable attorneys' fees), arising out of, or in connection with the gross negligence, recklessness, fraud, or misconduct of RDE or its employees, agents, and subcontractors, subject to the limitation set forth above in the section titled Standard Limitation of Liability.

Notices. All requests, demands and other communications required or permitted to be given hereunder shall be in writing and shall be deemed to have been given (a) when received, if delivered in person or sent via email, or (b) when sent, if send by facsimile with receipt confirmed, or (c) three (3) days following the mailing thereof, if mailed by certified first class mail, postage prepaid, return receipt requested, in any such case as follows:

if to RDE:
RDE System Support Group, LLC
44 Cedar Cliff Drive
Wayne, NJ 07470

if to Customer:
Jeff Cheek, Director
Department for HIV Elimination -
137 Peachtree Street, SW
Atlanta, GA 30303

Communications required or permitted to be given hereunder, if sent via email, shall be sent in PDF format, on official letterhead of the sender, and signed by an official signatory of the sender.

Change Order Management. In the event that the parties determine that changes to the Scope of Work are required, the parties shall execute a Change Order specifying the nature of the change, all requirements, and the cost of the change. Any Change Order must be in writing and signed by each Party, by persons duly authorized to legally bind such party.

Dispute Resolution. In the event of the occurrence of any dispute arising out of or relating to this Agreement or any SOW or any services performed hereunder, either party may, by written notice to the other, have such dispute referred to the respective senior management of each Party. If they shall be unable to resolve the dispute by good faith negotiations by their senior management within thirty (30) days of the disputing party's notice, or within such longer period as the parties may mutually agree to in writing, then the dispute may be finally settled by arbitration as provided herein. Notwithstanding the foregoing, each Party shall be entitled to seek injunctive relief and specific performance in any court or arbitral tribunal without waiting for the completion of any such negotiations or arbitration.

Any arbitration proceeding shall be conducted in accordance with the Arbitration Rules of the American Arbitration Association ("AAA"). The award of arbitration must be accepted by both parties in order to be final and binding upon the Parties. The place of arbitration shall be mutually agreed upon by the parties. The Parties agree to submit to the jurisdiction of the AAA for the purposes of the arbitration proceedings, and any counterclaims that relate in any respect to the Agreement or any SOW or any services performed hereunder. The arbitration shall be conducted by a panel of three persons. Within thirty (30) days after initiation of arbitration, each Party shall select one person to act as arbitrator and the two party-selected arbitrators shall select a third arbitrator within thirty (30) days of their appointment. If the arbitrators selected by the Parties fail to agree upon the third arbitrator, the third arbitrator shall be appointed by the AAA. If mutually agreed by the parties at the time the dispute arises, the arbitration specified in this Dispute Resolution Section shall be the procedure for the resolution of disputes between the parties arising out of or relating to this Agreement or any SOW or any services performed hereunder; provided, that a party, without prejudice to the above procedures, may seek injunctive relief or other provisional judicial relief if in its sole judgment such action is necessary to avoid irreparable harm or to enforce any arbitration decision.

Termination. In the event of a material breach of this Agreement, the non-breaching Party shall, within seven (7) days of discovering the material breach, provide written notice to the breaching Party, whereupon the breaching Party shall have thirty (60) days to correct the breach. If the material breach continues for a period of more than thirty (60) days after written notice of such material breach has been provided to the breaching Party, the non-breaching Party may terminate this Agreement immediately by written notice to the breaching Party. A longer period of time to correct the breach may be mutually agreed by the Parties in writing.

Upon termination of this Agreement for any reason whatsoever, Customer shall immediately cease using e2Fulton and return all copies of e2Fulton in the possession or control of Customer, and all materials related to e2Fulton, eCOMPAS and e2 in the possession or control of Customer.

Intellectual Property Rights. Exclusive of User-entered data, eCOMPAS, e2Fulton, and e2 are copyrighted works of RDE, and all systems and future modifications are wholly owned by RDE. At all times, RDE shall have title to eCOMPAS, e2Fulton, and e2, and all materials related thereto, all enhancements, modifications, and new versions thereof, and all copies or any portions thereof. RDE's title shall include, but not be limited to, all copyright, trademark, other intellectual property rights, or other rights in eCOMPAS, e2Fulton, and e2.

All data entered into the system by Customer and users is owned by Customer or to whomever Customer grants ownership rights.

No Modifications. Customer cannot modify eCOMPAS, e2Fulton, or e2, or any portions thereof. Nevertheless, any modifications done to eCOMPAS, e2Fulton, or e2 or any portions thereof are done for RDE as "works for hire," as defined by the Copyright Laws of the United States. User understands that all rights in those modifications shall belong to RDE.

Duty to Notify. Customer shall promptly notify RDE of any claim, action, cause of action or litigation brought against Customer, its employees, officers, agents, subcontractors or users, which arises out of the services provided under this Agreement. Customer shall also notify RDE whenever Customer has a reasonable basis for believing that Customer and/or its employees, officers, agents, subcontractors or End Users might become the subject of a claim, action, cause of action, criminal arrest, criminal charge or litigation arising out of and/or related to the services provided under this Agreement. Failure to provide the notices required by this paragraph is a material violation of the terms and conditions of this Agreement.

Customer agrees to furnish RDE with copies of any progress reports or other reports filed with HRSA or other Federal funding agencies, which relate to the services provided under this agreement.

Force Majeure. Neither User nor RDE shall be liable for failure or delay in the performance of its obligations due to any cause beyond its reasonable control such as fire, accident, act of the public enemy, war, rebellion, labor dispute, insurrection, transportation delays, energy, machinery, act of God, government, or the judiciary, or other elements or items singularly or in combination beyond the control of such party.

Headings. The headings of this Agreement are inserted merely for convenience and ease of reference and shall not affect or modify the meaning of any of the terms, covenants or conditions of this Agreement.

Severability. The provisions of this Agreement are severable, and any judicial determination that any provisions are invalid or unenforceable will not affect the validity or enforceability of any other provision, but rather will cause this Agreement first to be construed in all respects as if such invalid or unenforceable provisions were modified to terms that are valid and enforceable and provide to the greatest extent the rights expected by the parties hereto.

Counterparts. This Agreement may be executed in two or more counterparts (including by facsimile), each of which shall be deemed an original, and all of which together shall constitute one and the same instrument.

IN WITNESS WHEREOF, the parties hereto have duly executed this Agreement.

RDE SYSTEM SUPPORT GROUP, LLC	Fulton County Department for HIV Elimination
______________________________	______________________________
Signature	Signature
______________________________	______________________________
Name	Name
______________________________	______________________________
Title	Title
______________________________	______________________________
Date	Date

Attachment A

Fulton County Department for HIV Elimination
eCOMPAS Maintenance and Licensing Agreement

Deliverables and Payment Schedule, Scope of Work

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Software as a Service (SaaS) License for e2Fulton. Year-end System Modifications.	Estimated: TBD	$40,000.00

Prepaid Incentives for Client Satisfaction Survey and Consumer Needs Assessment.	Upon Contract Execution Estimated: October 20, 2023	$ 65,000.00

Project Scope of Work

The Project Scope of Work for Phases 1, 2, and 3 will provide the basis for the development of detailed final Specifications at the commencement of the Project. The development of final Specifications may result in mutually agreed upon revisions to the Project Scope, and the development of the Project and the implementation plan for the Project will be based on and defined by the final Specifications.

Upon the completion of detailed specifications for each project Phase, the timeline for that Phase will be mutually agreed by the parties. The timeline for each Phase will be stated in terms of durations and dependencies for the following tasks: sign-off on detailed specifications, delivery of prototype, completion of UAT and acceptance of prototype, delivery of launch-ready system.

e2Fulton 2023 Scope of Work

e2Fulton 2023-2024 Scope of Work Phases 1, 2, and 3

I. System Modifications and Enhancements – Contract Management and Fiscal

a. Contract Management Module Enhancements

i. Ability to add/edit/delete line items in contracts for sub-services under each Service Contract.

1. Personnel

a. Available data entry fields:

i. Position #
ii. Name
iii. Title
iv. Employment Status
v. Fringe Rate
vi. Custom Fringe Rate
vii. Hourly Rate (two field available for data entry)
viii. Hours Per Month (two field available for data entry)

ix. Total Monthly Salary (two field available for data entry)
x. FTE (two field available for data entry)
xi. Number of Months (two field available for data entry)
xii. Subtotal (two field available for data entry) (auto calculated field)

2. Ability to track multiple priority categories under a personnel record (sub gird)
    a. Available data entry fields:
        i. Priority Category
        ii. Percentage of Salary
        iii. Salary Total (auto calculated field)
        iv. Fringe Total (auto calculated field)
        v. Admin Percentage
        vi. Requested Admin Budget (auto calculated field)
        vii. Requested Budget (auto calculated field)
        viii. Goals and Objectives
        ix. Justifications/Methodology
3. Fringe
    a. Ability to enter primary and secondary fringe rates
    b. Available fringe components:
        i. F.I.C.A.
        ii. Health Insurance
        iii. Dental Insurance
        iv. Vision Insurance
        v. Life Insurance
        vi. Unemployment Insurance
        vii. Workers Compensation
        viii. Medicare
        ix. Medicaid
        x. Disability Insurance
        xi. Other
    c. Additional data entry fields:
        i. Justifications/Methodology
4. Travel
    a. Employee Travel
        i. Available data entry fields:
            1. Priority Category
            2. Line Item
            3. Sub-Line Item
            4. Miles Per Month
            5. Number of Months
            6. Cost Per Mile
            7. Mileage subtotal (auto calculated field)
            8. Parking per Month
            9. Parking Subtotal (auto calculated field)
            10. Admin Percentage
            11. Goals and objectives
            12. Justifications/Methodology
            13. Requested Admin Budget (auto

calculated field)
14. Requested Budget (auto calculated field)

b. Medical Transportation
   i. Available data entry fields:
      1. Line Item
      2. Sub-Line Item
      3. Cost Per One-Way Trip
      4. Trips per month per client
      5. Number of months
      6. Number of clients
      7. Goals and Objectives
      8. Justifications/Methodology
      9. Requested Budget (auto calculated field)

5. Equipment
   a. Available data entry fields:
      i. Priority Category
      ii. Line Item
      iii. Sub-Line Item
      iv. Method of Calculation
      v. Cost Per Month
      vi. Number of Months
      vii. Cost Subtotal (auto calculated field)
      viii. Percentage Charged to this priority category
      ix. Admin Percentage
      x. Goals and objectives
      xi. Justifications/Methodology
      xii. Requested Admin Budget (auto calculated field)
      xiii. Requested Budget (auto calculated field)
6. Contractual
   a. Available data entry fields:
      i. Priority Category
      ii. Line Item
      iii. Sub-Line Item
      iv. Method of Calculation
      v. Cost Per Month
      vi. Number of Months
      vii. Cost Subtotal (auto calculated field)
      viii. Percentage Charged to this priority category
      ix. Admin Percentage
      x. Goals and objectives
      xi. Justifications/Methodology
      xii. Requested Admin Budget (auto calculated field)
      xiii. Requested Budget (auto calculated field)
7. Supplies
   a. Available data entry fields:
      i. Priority Category
      ii. Line Item
      iii. Sub-Line Item
      iv. Method of Calculation

v. Cost Per Month
vi. Number of Months
vii. Cost Subtotal (auto calculated field)
viii. Percentage Charged to this priority category
ix. Admin Percentage
x. Goals and objectives
xi. Justifications/Methodology
xii. Requested Admin Budget (auto calculated field)
xiii. Requested Budget (auto calculated field)

8. Other
    a. Available data entry fields:
        i. Priority Category
        ii. Line Item
        iii. Sub-Line Item
        iv. Method of Calculation
        v. Cost Per Month
        vi. Number of Months
        vii. Cost Subtotal (auto calculated field)
        viii. Percentage Charged to this priority category
        ix. Admin Percentage
        x. Goals and objectives
        xi. Justifications/Methodology
        xii. Requested Admin Budget (auto calculated field)
        xiii. Requested Budget (auto calculated field)
9. Administrative
    a. Ability to view administrative cost breakdown by budget category and priority category.

ii. Ability to add notes to individual line items.

iii. Ability to track Indirect Cost for all budget categories/line items

iv. Ability to track Service Targets
1. Priority categories based on contract services
2. Ability to track unit and client targets
3. Ability to enter notes per priority category
4. Ability to track targets by month
5. Additional fields
    a. Justifications/Methodology

v. Ability to track Agency Contract
1. Available data entry fields:
    a. Contract/Committee Designee
    b. Name
    c. Phone
    d. Email

vi. Ability to upload/download/view supporting documentation
1. Available data entry fields:
    a. Document Name
    b. Document
    c. Notes

vii. Ability for administrators to add/edit/delete contract waves.
1. Available data entry fields:
    a. Process Type
    b. Source Grant

c. Destination Grant
d. Start Date
e. End Date
f. Wave Status

viii. Ability to accept/reject contracts through the contract negotiation process based on staff role.

1. Ability for super administrators to bypass contract navigation and make a contract live or contract changes take effect immediately.

2. Robust tracking of events that a contract must follow in order to be approved.

ix. Ability for users to monitor tasks assigned to them through the contract negotiation process.
1. Provider side dashboard
2. Admin dashboard

x. Ability for users to receive email notifications when action is required by them through the contract negotiation process.

xi. Ability to extract contract budget details to an excel file.

b. Fiscal Module Enhancements

i. Ability to track monthly expenditures by line item
1. Personnel budget category
a. Available data entry fields:
i. Personnel
ii. Priority Category
iii. Sub Priority Category
iv. Expenditure
v. FTE Actual
vi. Adjustment
vii. Budget (auto calculated field)
viii. Available Funds (auto calculated field)
ix. Contract Cost (auto calculated field)
x. Admin Cost (auto calculated field)
xi. Fringe Rate (auto calculated field)
xii. Fringe Cost (auto calculated field)
1. Ability to override/manually enter the Fringe Rates.
2. Allowing negative fringe rates.

2. All other budget categories (Client Travel, Staff Travel, Equipment, Contractual, Supplies, Other)
a. Available data entry fields:
i. Contract Item
ii. Sub Priority Category
iii. Expenditure
iv. Adjustment
v. Budget (auto calculated field)
vi. Available Funds (auto calculated field)
vii. Contract Cost (auto calculated field)

        viii. Admin Cost (auto calculated field)
        ix. Description
        x. Notes

ii. Ability to view budget summary report
    1. Columns
        a. Category
        b. Contract Budget
        c. Prior Cumulative Expenditures
        d. Current Expenditures for Reimbursement
        e. Remaining Balance
        f. YTD Expenditures
        g. % Expended to Date

iii. Ability to view the full report
    1. Displays all expenditures entered for month/contract

iv. Filters will provide the ability to filter by month.
    1. Include November Pre/Post Billing period
    2. Include Final Invoice period

v. Ability to upload/download/view supporting documentation
    1. Available data entry fields:
        a. Document Name
        b. Document
        c. Notes

vi. Ability to add electronic signature when submitting a report
    1. Ability for Program Designee and Fiscal Designee to add signatures

vii. Ability to add electronic signature when accepting a report on the admin side
    1. Ability for Project Officer, Fiscal Manager and Director to add signature

viii. Ability to track the following fields during monthly submission:
    1. Formula Amount
    2. Supplemental Amount
    3. QM Amount
    4. Carryover Amount
    5. Invoice Number / Date
    6. Receiver Number / Date
    7. MAI
    8. MAI Carryover
    9. EHE RWHAP Services
    10. EHE Initiatives
    11. EHE Infrastructure
    12. EHE QM
    13. EHE RWHAP Services Carryover
    14. EHE Initiatives Carryover
    15. EHE Infrastructure Carryover

ix. Ability to track the following fields per contract:
    1. Vendor Code
    2. Purchase Order #
    3. Formula Funding Line
    4. Supplemental Funding Line
    5. QM Funding Line
    6. Carryover funding line

7. MAI Funding Line
8. MAI Carryover Funding Line
9. EHE RWHAP Services Funding Line
10. EHE Initiatives Funding Line
11. EHE Infrastructure Funding Line
12. EHE QM Funding Line
13. EHE RWHAP Services Carryover Funding Line
14. EHE Initiatives Carryover Funding Line
15. EHE Infrastructure Carryover Funding Line

x. Ability to print a formatted monthly invoice.
   1. Includes the following:
      a. Vendor information
      b. Budget summary
      c. Line-item details
      d. Provider side signatures
      e. Admin side signatures
      f. Formulas/funding lines/amount breakdown

xi. Ability for users to receive email notifications when action is required by them through the invoicing process.

c. Fiscal Reports
   i. Expenditures Report
      1. Subcategory Expenditures Report
      2. Ability to Drill-down into Sub-categories
   ii. Allocation Report
   iii. Consolidated List of Contracts (CLC) Report
   iv. Service Category Report
   v. Aggregate Administrative Cost Report
   vi. WICY Report

II. System Modifications and Enhancements – Non-Fiscal

1. e2 Fulton Quality Management Features Enhancements
   a. e2 Visual HAB Performance Measures Report Enhancements
      i. Extended HAB Performance Measures [e2Fulton_a42]
         1. All Ages Performance Measures
            a. Influenza Immunization
            b. Lipid Screening
            c. Tuberculosis Screening
         2. Adolescent/Adult Performance Measures
            a. Cervical Cancer Screening
            b. Chlamydia Screening
            c. Gonorrhea Screening
            d. Hepatitis B Screening
            e. Hepatitis B Vaccination
            f. Hepatitis C Screening
            g. HIV Risk Counseling
            h. Oral Exam
            i. Pneumococcal Vaccination
            j. Substance Use Screening

        k. Syphilis Screening
    3. HAB Medical Case Management (MCM)
        a. Care Plan
    4. HAB Oral Health Measures
        a. Dental Medical History
        b. Dental Treatment Plan
        c. Oral Health Education
        d. Periodontal Screening or Examination
    5. System Performance Measures
        a. Late HIV Diagnosis
        b. Linkage to HIV Medical Care
        c. Housing Status
        d. Archived Adolescent Adult Measures
        e. Performance Measure
        f. ARV Therapy for Pregnant Women
        g. Adherence Assessment and Counseling
        h. Mental Health Screening
        i. EMA Performance Measure
        j. Performance Measure
        k. Rapid Linkage to Care
        l. HHS Linkage to Care
        m. Engaged Care
        n. Viral Load Suppression Retained
        o. Viral Load Suppression among those Prescribed ART
        p. Hepatitis A Screening
        q. Hepatitis A Vaccination

b. e2 Visual Analytics Report Enhancements [e2Fulton_a17]
    i. Ability to render the Visual Analytics measures into a heat map using client's most recent residency data. Street address geo location will be used if available, otherwise zip code will be used for mapping as a back-up.
    ii. Ability to filter clients by county of residence [e2Fulton_a99]

c. Quarterly Agency Progress Report Submission [e2Fulton_w27]
    i. Ability to track program narratives
    ii. Ability to view service targets
    iii. Ability to view HAB performance measures
        1. HIV Care Continuum
        2. HIV Care Continuum by Subpopulations
        3. Core Measures
    iv. Ability to view EMA Measures
    v. Ability to view RSR Summary Report
    vi. Ability to enter Early Identification of Individuals with HIV/AIDS (EIIHA) information
    vii. Ability to enter Community Involvement information
    viii. Ability to securely upload documents
    ix. Ability to add electronic signatures
        1. Program and Fiscal Designee
    x. Ability to export the report to PDF
    xi. Ability to receive email notifications upon submission of the report
    xii. Administrators will have the ability to filter by sub-recipient.
    xiii. Filters will provide the ability to specify funding source.

xiv. Filters will provide the ability to filter by month.
    1. Report submitted quarterly
xv. Ability for subrecipients to submit a report.
xvi. Ability for administrators to accept/reject a report.
xvii. Ability to view report submission history.

d. Client Services Report (Service Expenditures Report (RW) [e2Fulton_a90]
    i. The Service Expenditure Report allows users to view, in real-time, a count of service units and total dollar amounts for each service category.
    ii. Ability to display the report by breakdown of subservices
    iii. Administrators will have the ability to run this report for any number of sub-recipients.
    iv. Filters will provide the ability to specify contracts and founding sources.
    v. Addition of columns for Newly Diagnosed & Newly Enrolled. [e2Fulton_a11]
    vi. Addition of filter for Client County of residence [e2Fulton_a100]

e. Data Quality Report [e2Fulton_a92]
    i. Identifies missing data for clients receiving services from specific funding stream and identify data completeness issues in specific areas like Demographics, Medical, HIV information etc. to support Quality Management, RSR reporting and other activities.
        1. Ability to report clients with duplicate services or screenings.
        2. Ability to report clients with missing required fields.
        3. Ability to report clients with duplicate labs.
        4. Ability to report clients missing certain labs.
        5. Ability to report clients with duplicate medications.
        6. Ability to report clients Prescribed a PCP or MAC Prophylaxis with CD4 under 200.
        7. Ability to report clients NOT Prescribed a PCP or MAC Prophylaxis with CD4 ABOVE 200.
        8. Ability to report clients with duplicate immunizations.
    i. Report Filters allow users to specify a date range and funding source.
    ii. Client drill downs can navigate to the client's record where the missing data was found.
    iii. Options to export the report into a PDF or an Excel spreadsheet.
    iv. Ability to report client with eligibility issues (Gap, Expired)

f. Referrals Report (RW) [e2Fulton_a91]
    i. Aggregate report to display total number of incoming and outgoing referrals, referrals by status and service category.
    ii. Ability to report the number for of unique clients for each service category.

2. e2Fulton Client Data Management Features Enhancements
    a. Client Record Management Module
        i. Ability to add/edit Client Demographics Information.
        i. Ability to add/edit/delete Longitudinal records of Client Residency.
        ii. Ability to geo-map Client Residency records

ii. Post-Launch Client Data Modifications
    i. Make Ethnicity and Race not required
    ii. Updates to Client Contact Information Logic for clients without a phone number or email.
    iii. Updates to Data Dictionary for HIV Diagnosis Date and AIDS Diagnosis full Dates for Import from CAREWare
    iv. New checkbox field for Demographics Screen for MAI Clients
    v. Addition of COVID-19 Immunizations and Oral Health Care Sub-services

b. Client Service Delivery and Tracking Module Updates
    i. Ability to specify the location where service was delivered (Depending on the agency)
    ii. Robust cross validation with Client RW Part B, Eligibility to notify users if a client is ineligible for the service and/or to prevent service entry.
    iii. Robust cross validation with Client RW Part C to notify users if a client is ineligible for the service and/or to prevent service entry.
    iv. Robust cross validation with Client RW Part D Eligibility to notify users if a client is ineligible for the service and/or to prevent service entry.
    v. Robust cross validation with Client RW EHE Eligibility to notify users if a Agency location is ineligible for the service and/or to prevent service entry.

3. e2Fulton Administrative Features
    a. Real-Time Data Extract Updates
        i. Advanced Data Extract Configuration (Version 2)
        ii. Ability to generate the Data Extract in CSV file format
4. e2Fulton Referrals and Data Sharing Features
    a. Referrals Management Module Updates
        i. Ability to specify/assign a referral to a location depending on the agency.
    b. Data Sharing: Common Client Consent and Transparent Data Sharing Updates
        i. Ability to revoke consent to view and edit a client's record for a single agency. (Launched)
        ii. Ability to revoke consent for multiple agencies at the same time instead of having to upload a revoke document for each one. (Launched)
        iii. Updates to data sharing rules so after the launch Grace Period, any clients without consent will be hidden from the agencies they were imported under.
5. Client Eligibility and Recertification
    a. Automated Ryan White Part A Eligibility Determination Updates
        i. e2 Automated Eligibility Module determines each Client's RW part B eligibility start date and end date based on provided eligibility rules/criteria
        ii. e2 Automated Eligibility Module determines each Client's RW part C eligibility start date and end date based on provided eligibility rules/criteria
        iii. e2 Automated Eligibility Module determines each Client's RW part D eligibility start date and end date based on provided eligibility rules/criteria.
        iv. An eligibility status report allows users to review a table with all clients' Eligibility Status if they've been served by the current user's agency. The reports also highlights clients who's eligibility has already expired or clients who's eligibility will expire in the next 30 days.

v. Eligibility Updates following HRSA guidance making 6-Month Eligibility and Recertification optional.

6. e2Fulton Reports
   a. Ryan White HIV/AIDS Program Services Report (RSR) Enhancements
      i. RW Part B Eligible Clients and their services will be reported in the RSR as per HRSA specifications.
      ii. RW Part C Eligible Clients and their services will be reported in the RSR as per HRSA specifications.
      iii. RW Part D Eligible Clients and their services will be reported in the RSR as per HRSA specifications.
      iv. Add an "export as excel" or similar, a CSV file for zip codes. Same information as currently in the system for the RSR.

III. New System Enhancements for 2023 and 2024 (Phases 1, 2 and 3) - Contract Management and Fiscal. (Fiscal and Contract Management Updates).

   a. Fiscal Module Alerts
      i. Alert to project officer when agency submits an invoice. **[e2Fulton_q50]**
         1. Alerts may be provided via either secure messaging or email.
         2. Alert will state that the Project Officer should access e2Fulton to view a newly submitted invoice.
         3. Details to be determined in specification documents, including wording and layout.

   b. Fiscal Reports
      i. In the Expenditure Report, ability to select EHE contracts and run the report for EHE.**[e2Fulton_w30]**In the Subcategory Expenditure Report, ability to select one or more available contracts. **[e2Fulton_w31]**
         1. Layout of the report to be determined in specification documents.
      ii. In the Fiscal Reports, addition of a column that shows a specific month's priority category amount instead of the full Year To Date (YTD). **[e2Fulton_w46]**
         1. Needed workflow: Provider users can see how much they spend from each category each month without manual calculation.
         2. Details to be determined in specification documents.

   c. Contract Management Updates
      i. Addition of a new text field in contract data entry labeled Delivery Order Number.
         1. Each Month will have its own Delivery Order Number. **[e2Fulton_w100, e2Fulton_w123]**
      ii. Ability to copy service contracts over for a new grant year, copying subservices for agencies.
         1. Ability to do post-copy modifications. **[e2Fulton_w101, e2Fulton_q150]**
         2. Layout to be determined in specification documents.
         3. Roles and Permissions will be updated to set access to ability to copy service contracts.

d. Invoicing
   i. Update to invoice summary that displays line items following the reference model on the fiscal submit tab. HOPWA is not included. **[e2Fulton_w120]**

e. ECM - HRSA Expenditure Report. Breakdown of expenditures by (Formula, Supplemental, Carryover, etc.) overall and by respective funding line. **[e2Fulton_w37]**
   i. Update to Existing Expenditures Report to include the amount breakdowns.

IV. New System Enhancements for 2023 and 2024 (Phases 1, 2 and 3). Non-Fiscal.

1. Client Satisfaction Survey
   a. Inclusion of patients from the following clinics to the Client Satisfaction Survey (CSS) Module: **[e2Fulton_w41]**
      i. HOPE Atlanta
      ii. NAESM Men's (Carl Bean)
      iii. Atlanta Harm
      iv. Heather Ivy
      v. To Our Shores
      vi. Others as needed.

2. Import Module Updates
   a. Additional Import Module Support for CSV Files **[e2Fulton_w43]**
      i. Ability to accept or reject all clients that do not already exist in e2Fulton. An "Accept all/Reject All" option will be added to the Intake – New Enrollments screen.
      ii. Addition of a post import summary screen which includes the number of imported records and an extract option.
         1. Layout of screen and one format of extract option to be determined in specification documents. Addition or removal of non-calculated fields (fields that do not need calculation to be displayed) can be done upon request from Fulton County after production.
   b. Client – Level Data – Imports **[e2Fulton_q149]**
      i. New capability for the e2Fulton Import Module to allow specific users to delete patient services. This capability can be added or removed without affecting general import access.
         1. User Roles and Permissions to be updated to allow Fulton County to determine who has access to deletion capability.
         2. Capability will be implemented through An adjustment to the existing Import Module, allowing users to flag certain services as services to be deleted instead of added.

3. Quality Management Updates
   a. HAB Performance Measures Report Updates
      i. Addition of Pre-Art Reason and Allergies to medication grid and a Measure.

        1. Measure specifications to be determined in specification documents. **[e2Fulton_w44]**
        2. Fulton County can request an adjustment to the definition one time after launch.
    ii. Adding a third column to the existing Numerator and Denominator columns for each measure. The third column, Gap, will show clients that are in the denominator but not the numerator.
        1. Client Drilldowns will be available for the Gap column.
            a. Ability to export clients to PDF or Excel. **[e2Fulton_w338]**
        2. Layout to be determined in specification documents.

    iii. Addition of a Performance Measure that gauges **[e2Fulton_w39]:**
        1. Positive Hep C
        2. Hep B Vaccinations
        3. New Measures will have the same export and drilldown capabilities as existing e2Fulton HAB Measures.
        4. Definitions will be determined in specification documents.

b. Visual Analytics Report
    i. Update existing age range filter to allow users to input age on a user specified date with <,>,<=,>=,= as qualifiers.. **[e2Fulton_q119]**
        1. Layout to be determined in specification documents.
    ii. Adding result for joint MSM & IDU in HIV Risk Factors to pre-existing options. **[e2Fulton_q144]**

    iii. Addition of HIV Diagnosis Date as a Filter. **[e2Fulton_q198]**

c. Data Quality Report **[e2Fulton]**
    i. Addition of a new report for de-duplicated service count with client drilldowns. Client drilldowns are a list of clients that meet criteria and contain hyperlinks to the client profile, allowing the user to easily access each profile.
        1. Ability to export Client Drilldowns to excel and PDF.
        2. Ability to export Report to excel and PDF.
    ii. Addition of Report to the Roles and Permissions specification document.
        1. Document will determine which user roles in e2Fulton can view the report.
    iii. Data Quality Metrics with drilldowns for the following categories:
        1. Labs
        2. Immunizations
        3. Medications
        4. Pregnancy
        5. Missing Consent with Agency ID
    iv. Layout and filters to be determined in specification documents.

d. Eligibility Gap Report (Missing Consent Report) **[e2Fulton_q105]**
    i. Addition of a new report to display clients that are missing their supporting documentation considered by the Eligibility Module (e.g. proof of HIV status, proof of residency, etc.).
        1. Displayed supporting documentation will be based on the Eligibility Module algorithm's requirements and will be updated if there is an update to the Eligibility Module.
    ii. Addition of Report to the Roles and Permissions specification document.
        1. Document will determine which user roles in e2Fulton can view the report.
    iii. Each displayed record will contain a hyperlink to the client profile.
    iv. Layout and filters to be determined in specification documents.

4. Data Admin Module **[e2Fulton_w38]**
    a. The Data Admin Module provides a set of screens that allows Fulton County Super Administrators to edit the "Data Lists" of options available in some data fields of the system:
        i. Labs
        ii. Service Categories
        iii. Subservices
        iv. Priority Categories
        v. Immunizations
        vi. Medications
    b. The Data Admin modules also provides super-administrators the ability to configure how each option in system "Data Lists" behave with the following components and reports (Where Applicable):
        i. Contract Management
        ii. Report Filtering
        iii. Procurement and Fiscal Modules
        iv. Client-Level Data Entry Screens
        v. RSR Report
        vi. HAB Performance Measure Report
        vii. Visual Analytics
    c. Ability to edit Data Import Mappings.
        i. Details to be determined in specification documents.
        ii. Roles and Permissions will be updated to specify user access to edit Data Import Mappings.
    d. Roles and Permissions will be updated to specify user access to view Data Admin Module.

5. Productivity Report
    a. Staff Usage and Activity Report **[e2Fulton_q84]**
    b. Addition of Report to the Roles and Permissions specification document.

        i. Document will determine which user roles in e2Fulton can view the report.

    c. List of measurable categories to be determined in specification documents.
    d. Layout and filters to be determined in specification documents.

6. RSR
    a. Inclusion of the Agency ID in the Export to PDF and Export to Excel data downloaded from the Errors, Warnings, and Alerts by Category section of the RSR Summary. **[e2Fulton_w109]**

7. Service Delivery Module Update
    a. Addition of a Staff Selection Field during Service Entry. Staff Selection options will be auto-generated from e2Fulton users based on specifications to be determined. A specific provider will be tied to the service based on the associated provider. **[e2Fulton_w11]**

8. Client-Level Data - System Administration Update
    a. Ability for super administrator to add/edit/view Agency Locations for sub-recipients. **[e2Fulton_w14]**

9. All Reports Update
    a. Ability to filter Reports by Service Location. **[e2Fulton_w6]**
        i. Ability for users to filter certain reports based on the "Provider Location" data field entered by users during Service-Entry.
        ii. This is a modification to the existing "Clients Served Filtering" Widget that some Reports can use to filter by either "Clients Served" or "Services Provided" By the selected location(s):
            1. e2 Visual Analytics (For Clients Served by filtered Location(s))
            2. HAB Performance Measures (For Clients Served by filtered Location(s))
            3. Client Services Count (For Services Provided by filtered Location(s))
            4. Eligibility Status (For Clients Served by filtered Location(s))

10. Referral Extract Update **[e2Fulton_w135]**
    a. Addition of a calculated column to the existing e2Fulton CSV and ACCESS modules to include a Completion Date for each different referral status. (Example: Date Created, Date Approved, Date Completed)

11. Document Tracker Updates **[e2Fulton_w136]**
    a. Addition of data collection element(s) to the existing e2Fulton Document Tracker Module:
        i. A new "Date Obtained" Field will be added for users to enter the date that each client document was obtained.

    b. Additional details about data-entry requirements and visual layouts will be determined during specifications.
    c. The additional field(s) will be added to the existing e2Fulton Data Extract.
    d. The additional field(s) will not have an impact on the existing e2Fulton eligibility calculation algorithm.

V. Part C Capacity Development Grant Project Components. Project Start-up and Development of Detailed Specifications.

1. <u>Project Planning and Technical Specifications</u>

   a. Project Planning
      i. Stakeholder Engagement Meetings (Virtual, recurring)
      ii. Develop project plan- Please note: Any delay in the completion date for any scheduled task will result in a corresponding delay for subsequent tasks in the timeline, due dependencies as identified in the schedule above.

   b. RDE will assist Fulton DHE to develop detailed technical specifications to meet requirements listed in this scope of work.
   c. Finalize data dictionaries and cross walks that list all the fields Fulton DHE would like to track. RDE will provide a pre-existing data dictionary that Fulton DHE can review, add missing information and finalize the documents.
   d. If not otherwise stated in detailed specifications, approved features of Fulton e2Linkage will follow the National Resource Guide reference model.
   e. Fulton DHE will review and finalize Level 1 fields that require encryption through LKMv2.2. RDE will provide a suggested list.
   f. Specifications will be final with Fulton DHE Signed Concurrence, as per deliverables/project plan schedule. Changes to specifications after Fulton DHE Signed Concurrence will require Fulton DHE approval, as changes to specifications may impact project timeline.

2. <u>e2Linkage Client-Facing Resource & Information Locating Tool - Preliminary Release</u>

   a. Visitor Screen [Fulton_C_1]
      i. The homepage will display all of the resource guide's locations
         1. Google maps is used and has an interactive map with markers for each location.
            a. Clicking on a location's marker will bring up a pop-up window with additional information.
         2. Each location is also displayed in a "card" format inside the sidebar.
            a. Required Fields
               1) Provider Name
               2) Address
            a. Optional Fields
               1) Hours of Operation
               2) Description
               3) Contact Email Address

4) Phone Number
5) Fax Number
6) Website URL

3. Each location has a button to display more Information
   a. All the location's fields
   b. A list of services provided
   c. A map with a marker zoomed in on the location.

ii. When visiting the homepage on a mobile device.
   1. Location cards use the full width of the screen for easy reading.
   2. The main Google Map is hidden for a faster load time.

iii. Visitors can search for locations by typing in what they are looking for.
   1. Matches are based on the provider's name, address of locations and services provided.
   2. An area search will display all locations within a radius of the visitor's location.
      a. The visitor can automatically provide a location from his device or enter a custom address to base the search on.
      b. Add 1 mile radius option.

iv. The home page will contain a link that visitors can use to begin registration to e2MyCare.
   1. Visitors must follow procedures outlined in the e2MyCare section to have an account created.

b. Administration [Fulton_C_2]

i. Administration will be done through e2Fulton. Individuals with pre-existing access will not need new accounts.

ii. Review of e2Fulton Roles and Permissions to create any new roles needed for administration of e2Linkage.

iii. Review of e2Fulton Roles and Permissions to add the following permissions to existing roles:
   1. Access to e2Linkage Reports
   2. Access to View and Edit Resource Guide Data
   3. Access to View and Edit Resource Guide Settings

iv. Admins with user management permissions will be able to:
   1. Create or Delete Accounts
   2. Assign or modify permissions

v. Resource guide Settings can be modified by administrators.
   1. The Site Title and Banner image displayed at the top of the visitor screen.
   2. The welcome message shown to first-time users.
   3. The Color scheme of the home page
   4. Enable or disable advanced search features.
      a. Area search
      b. Filter by Providers
      c. Filter by Service

vi. A table layout is used to quickly navigate through and add new locations, services, and providers.

1. Locations can have their address geo-coded at the press of a button.
    a. A small map is displayed to ensure data quality.
2. Services are added to a location by picking from an existing list or created on-the-fly.
3. Locations are associated with a provider in order to facilitate search and resource management.
4. The administrative interface to manage resources is divided into 3 tabs.
    a. Services
    b. Providers
    c. Locations

c. Client-Facing Health Data Portal (e2MyCare), e2Linkage Extended Functionality, and e2Fulton Updates

i. e2MyCare Platform & Login Screen [Fulton_C_3]

1. e2MyCare is accessible via any up-to-date web browser on PC, such as Chrome, Safari, FireFox, or Microsoft Edge, as well as Android and iOS mobile web browsers.
2. Clients will require an account to access their e2MyCare account.
    a. This account will be provided to them through e2Fulton.
    b. For an account to be created for a client, the client must have a client record in e2Fulton with an e2ID.
3. Clients will have the ability to select their preferred language from one of the following options:
    a. English (Default)
    b. Spanish (Spanish translation to be provided by Fulton Co.)

ii. e2MyCare Calendar / Adherence Module: Basic Implementation [Fulton_C_4]

1. Calendar View
    a. Monthly view

    b. Color-coded day markers indicate when an event (medicine or appointment) is scheduled.
        1) Type of event.
        2) Whether past event was adhered to or not.
    c. Selecting a day will show each event notification in a list.

2. Client can confirm whether or not event (medicine or appointment) is adhered to by selecting from list of events.
3. Other information can be entered by the client when selecting a record, such as why an event was skipped or medication side-effects.
4. SMS text messages can be sent to clients for scheduled appointments and medication doses.

iii. E2Fulton Management Module for e2MyCare: Basic Implementation [Fulton_C_5]

1. e2Fulton staff with client access can grant client access to e2MyCare via two methods:
   a. "e2MyCare Patient Portal" tab in client record.
   b. Client record as listed in e2Fulton Management Module for e2MyCare.
2. Requirements for client activation:
   a. E2Fulton user has access to client.
   b. Client has phone number or e-mail address recorded to client record.

iv. e2MyCare Recertification Portal: Basic Functionality [Fulton_C_6]

1. Basic functionality includes interfaces to upload documents to a remote server by selecting a file or taking a picture from their mobile device and adding a short description, as well as to review and edit past uploads by the client.
2. Past entries will be searchable.
3. Applicable document types matches that of uploadable client documents in e2Fulton.

v. e2MyCare Client & e2Fulton Staff Secure Messaging Modules [Fulton_C_7]

1. Both clients and administrative users will be able to communicate in real-time.
2. A new conversation can be initiated by either the client or a counselor. A conversation will end once it is closed by either party.
3. Clients will receive a notification when they receive a new message.
4. A client will be able to see their full conversation history.
5. Messages are 2-way encrypted and HIPAA compliant.
6. When the conversation is initiated by the case manager, the client will receive a text message directing them to the secure messaging feature in the e2MyCare App. Details to be determined during the development of detailed specifications.

vi. e2Fulton Management Module for e2MyCare: Advanced Functionality [Fulton_C_8]

1. New features for administrative users in e2Fulton:
   a. Ability to send the following to e2MyCare clients:
      1) Medication reminders

        2) Appointment reminders
        3) Prescription refill notifications
        4) Referrals for services
        5) Etc.
    b. Ability to view the following e2MyCare client self-reported data points:
        1) Medication adherence
        2) Appointment attendance
        3) Medication side-effects
    c. Full access to secure messenger and video chats.
    d. Capability to customize SMS text messages sent to client.
2. Permission sets for these features will be made available in e2Fulton to allow for manual configuration of e2Fulton users in the User Manager Module.
3. New e2Fulton user roles will be created for Care Team roles.
4. Appointments through e2MyCare that are marked as adhered to will appear as primary care visits in e2Fulton.

vii. Client Satisfaction Surveys [Fulton_C_9]
1. Integration of service-specific Client Satisfaction questions into e2MyCare Patient Portal workflow.
2. Add alerts to e2Fulton service entry as a reminder for Providers/Case Managers to inform Consumers to complete client satisfaction survey that would be emailed to them.
3. Add alert/validation warning to e2Fulton service entry screen to update consumer/client email/phone number if its missing from e2Fulton.
4. Automated e-mail / SMS alerts to client's e-mail address / phone number when service data entry is posted in e2Fulton.
5. Bundling of service alerts to avoid multiple e-mails / SMS sent to client (if multiple services are provided on the same day).
6. Make CSS Data Extract available in e2Fulton.
7. Details relating to the surveys to be determined during the development of detailed specifications.

viii. e2Fulton Reporting Filter for e2MyCare-Enabled Sub-Population [Fulton_C_10]
1. Add a filter to the following e2Fulton reports & modules to allow population filtering for only clients who have an account in e2MyCare:
    a. e2Visual HAB Measures Report
    b. e2Visual Analytics
    c. e2 Care Continuum Dashboard

ix. e2Linkage: Advanced Functionality [Fulton_C_11]
1. In-Care / Out-of-Care Identification
    a. All user input sent to Fulton DHE & sub-recipients will include whether or not the client/consumer who entered the data is a known e2MyCare user or not.

1) Clients logged in to e2MyCare will be able to access e2Linkage via in-application link.
2) Opening e2Linkage via this link will track client usage of e2Linkage via an encrypted URL code.

2. E2Fulton Linkage to Care Report
   a. Summarizes all incoming requestions for information, services, an e2MyCare enrollment.
   b. Indicates whether or not a client already has a client record in e2Fulton, has a client record but has fallen out of care, or has not yet linked to or engaged in care.
      1) Determination requires that client has an e2MyCare account.
      2) Clients without an account will be determined as not linked to care.
   c. e2Fulton client access rules determine Linkage to Care Report client accessibility.
3. Client Information Repository (Resource Guide)
   a. An interface in e2Linkage which allows clients to access and download information made available by Fulton DHE and sub-recipients.
   b. Also allows for access to external links.

x. e2MyCare Gamification & Client Goal Setting [Fulton_C_12]
1. Clients will be able to set goals for adherence, viral load suppression, and other trends over time.
2. Clients will be able to set whether or not to receive goal reminders through SMS or e-mail.
3. Clients will receive reaffirming messages in the e2MyCare UI regarding their goal progress.
4. Clients can receive virtual prizes to provide positive re-enforcement when they complete their goals.

xi. e2MyCare Recertification Portal: Advanced Functionality [Fulton_C_13]
1. e2Fulton Data Integration
   a. Files uploaded by clients to the e2MyCare Recertification Portal will be made available to e2Fulton users.
   b. E2Fulton client accessibility and data sharing rules will determine which e2Fulton users can see uploaded documents.
   c. Approved uploads will satisfy e2Fulton document requirements as needed.
2. Status Review Module
   a. e2Fulton Staff
      1) Will be able to review and approve / deny uploads by clients.
      2) Will be able to request documents by creating documentation records, or request that client re-upload a rejected document.

3) Linkage to the secure messaging module to add messages to requests.

b. e2MyCare

1) Clients will be able to begin the document submission process on their end by creating a new record with upload.
2) Validations, prompts, and SMS reminders will guide clients through the application process.
3) Capability to view a checklist of information and documentation needed to complete the process.
4) Linkage to the secure messaging module to add messages to requests.

xii. Messaging & Security Report [Fulton_C_14]

1. Provides each medical case managers with an overview of the status of their client accounts.
2. Lists all open secure messaging conversations and identifies clients with unread messages.
3. Enables case managers to unlock e2MyCare accounts have been locked for security reasons.

xiii. SMS Text Messages: Advanced Functionality [Fulton_C_15]

1. Ability for clients to respond to SMS text messages and for e2MyCare to process those responses.
2. Additional SMS test message reminders for referrals, goals, and recertification.
3. A SMS Settings Module will be made available to e2MyCare client users to configure what kind of SMS they receive, change their contact information, etc.

xiv. Video Chat [Fulton_C_16]

1. Ability for authorized users to schedule video chat calls with clients they have access to.
2. Creation will be done through the Appointments module, which will add all created zoom calls to the client's adherence calendar.
3. Link to video conference can be stored as a text field, allowing for any platform to be used.
4. Direct Zoom API integration will allow users to leverage their Zoom accounts to create, edit, and manage Zoom calls from e2Fulton directly.

VI. Software as a Service License Fee for all Phases and Items

The e2Fulton Software as a Service (SaaS) license includes all licensing, hosting, maintenance and technical assistance necessary for Fulton County and its subrecipients to utilize e2Fulton during the contract term. The SaaS license fee for e2Fulton is a fixed fee, charged on an annual basis. The following is a list of items included in the annual SaaS license fee with brief descriptions of the included items.

1. List of items included in the SaaS License Fee

   i. Licensing
   ii. Hosting
   iii. Maintenance
   iv. Security monitoring, scanning and logging
   v. Performance monitoring and logging
   vi. Application exception reporting
   vii. Stability monitoring

2. Licensing. Licensing covers the use of e2Fulton by Fulton County and its subrecipients for the purposes described in the contract. The number of individual users is not limited, and RDE does not charge an additional license fee for an increase in the number of locations or users.

3. Hosting. e2Fulton is hosted on Amazon Web Services GovCloud, a FedRAMP-certified cloud service provider. There will be two instances of e2Fulton hosted on two AWS GovCloud environments: the live site which contains client data, on the production environment, the staging site on the staging environment. The cost of FedRAMP-certified AWS GovCloud hosting for both instances is included in the SaaS license fee for e2Fulton. Additional information about AWS GovCloud and the other advanced security features of e2HDC can be provided upon request. In addition to the live site and staging site, there will be a demo/training site, which will be hosted on RDE's internal network.

4. Maintenance. RDE is responsible for the maintenance and support of the AWS GovCloud servers used for e2Fulton, as well as maintenance of the e2Fulton database and e2Fulton software. The cost of all maintenance is included in the SaaS license fee for e2Fulton regardless of the time spent or number of activities performed. Maintenance and support performed by RDE includes the following:

   1. Monitor and maintain MS Windows Server Backups. All systems are backed up onto a secure offsite backup system and copies are stored locally on a NAS for redundancy. Backups are encrypted using 256-bit AES encryption. VSS (volume shadow copies) are checked for data integrity.
   2. Monitor and maintain Database Backups.
   3. Review, approve and install WSUS (Windows operating system) updates.
   4. Reboot / Refresh network services and equipment.
   5. Review, approve and install Java Updates and application server Updates across all application Web Servers.

6. Check log shipping status on database servers.
7. Review, approve and install Cisco ASA updates.
8. Check and update load balancer/DNS device, which must be updated to properly point to RDE AWS servers.
9. Review, approve and install other software updates across all Servers.
10. Configure and maintain automated server monitoring uptime and downtime alerts.
11. Configure and maintain secure administrative controls.
12. Configuring and performing regular anti-malware/anti-virus scans and protection on all servers.
13. Configure and maintain network firewall.
14. Monitoring system performance and resource usage on all servers and performing updates accordingly.
15. Check, monitor, and ensure that all of our TLS certifications are valid, up to date, and are encrypted to the highest standard accepted by HIPAA.

More information on monitoring and scanning is provided in Security Monitoring, Scanning and Logging, below.

5. Maintenance of the e2Fulton software includes software updates and security updates and patches. These updates, which in some years are very extensive, are included in the SaaS license fee, and are performed by RDE at no additional cost to Fulton County. The review and approval of updates is an exacting process which requires the evaluation of all updates issued, in order to ensure no incompatibilities or other system issues (such as slowness) will be introduced. After a thorough initial review, updates are installed on the staging environment, which mirrors the production environment, and are carefully tested, before being finally installed on the live e2Fulton site.

6. Maintenance of the e2Fulton software also includes upgrading the system to meet new HRSA federal reporting requirements based on annual changes to the Ryan White HIV/AIDS Program Services Report (RSR).

7. The following system changes, if requested in response to the changing needs of Fulton Co., are also included in maintenance of the software, and will be performed at no additional cost to Fulton Co.:

   a. Subject to the limitations in paragraphs b-e, changes to the following fields in the client profile will be considered maintenance.
      i. Client Intake Information
      ii. Emergency Contact Information
      iii. Client Contact Information
      iv. Demographics
      v. HIV Status
      vi. Housing Status
      vii. Labs
      viii. Immunizations
      ix. Medications

x. Primary Care
xi. Primary Care Visits
xii. Pregnancy

b. Adding Fields
   i. The addition of calculated fields or fields requiring skip logic is not considered maintenance. Calculated fields take data from one or more fields and perform a calculation, such as combining, transforming, aggregating, or filtering.
   ii. The addition of fields that are used for calculations required for calculated fields, such as combining, transforming, aggregating, or filtering, is not considered maintenance.

c. Editing Fields
   i. Edits to calculated fields and edits requiring or affecting skip logic are not considered maintenance.
   ii. Edits to fields that are used for calculations required for calculated fields, such as combining, transforming, aggregating, or filtering, are not considered maintenance.

d. Removing Fields
   i. Removal of fields that are used for calculations required for calculated fields, such as combining, transforming, aggregating, or filtering, is not considered maintenance.
   ii. Removal of fields is not considered maintenance if skip logic will be affected.

e. Adding, Editing, or Removing of Options in Client Profile
   i. Adding, editing, or removal of options in the Client Profile is not considered maintenance if calculations used in calculated fields will be affected.

8. Security Monitoring, Scanning and Logging. RDE provides regular and systematic monitoring of the e2Fulton infrastructure and application. System monitoring is designed to track and measure system performance against baseline measures, as well as monitor and log system usage, and detect and report suspicious activity. A high-level list of System monitoring activities includes the following:

   a. Host HTTP/HTTPS web checks: monitors reachability of the website.
   b. User IP address monitoring: logs IP addresses for each user visit to e2Fulton.
   c. System Services: Checks to ensure critical services such as IIS, ColdFusion, SQL Agents, etc. are running.
   d. CloudWatch Remote Login Monitoring: logs users who access the servers, reports suspicious activity.
   e. In addition, RDE performs application level vulnerability scans of e2Fulton, semi-annually at the least, and also prior to major feature launches. Antivirus scans are performed continuously in real-time, using threat-monitoring software.

f. Finally, e2Fulton logs all user activity, including when users view records, edit data, or create new records. These audit records are kept forever without expiration, and are available if required for forensic investigation.

9. Performance Monitoring and Logging. RDE provides regular and systematic monitoring of the e2Fulton infrastructure and application performance. System performance monitoring is designed to track and measure system performance against baseline measures, as well as monitor and log system usage. A high-level list of System performance monitoring and logging activities includes the following:

   a. Monthly Web Performance: monitors individual webpages for (MaxTime, MinTime, AVG, TotalRequests, etc.)
   b. Physical System Performance Monitoring Metrics:
      i. CPU Utilization
      ii. Disk Reads/Writes
      iii. Disk Space
      iv. Memory Consumption
      v. Network Packets I/O
      vi. Instance Status Checks: Checks health of the system overall for hardware failures.

10. Application Exception Monitoring and Reporting. Application monitoring is designed to detect and record application exceptions such as errors and alerts from the system. A high-level list of application monitoring activities includes the following:

   a. Application Exceptions: errors, warnings and alerts from e2HDC.
   b. System Statistics: monitors aggregate data volume and user activity statistics in e2HDC.

11. System Stability Monitoring. RDE monitors the stability of the system on an ongoing basis. The site is up and available 24/7, except during brief periods of planned maintenance, during hours of low system usage. Even during periods of frequent, major launches, system downtime will be limited to brief periods, usually no more than 15-30 minutes or less, in order to maximize uptime and availability.