



Exhibit Q, Requirements Traceability Matrix (RTM)

RFO No. HHS0017021

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1.0 Requirements

The requirements for this Scope of Work are detailed herein. The Contractor must meet or exceed the requirements for Services as specified in this section. Certain requirements reference **Table 9: Deliverables** (Deliverables Table or “DEL”) and **Table 8: Key Performance & Liquidated Damages** (Key Performance Measures or “KPM”), which define associated deliverables, performance standards, and enforcement mechanisms applicable to the Services described herein.

1.1 Transition Phase Requirements

The Transition Phase requirements included in **Table 1: Transition Requirements** describe the tasks and activities that Contractor will perform during the Transition Phase and must be completed between the Contract Execution Date and the Operations Start Date. The Contractor must work with HHSC to transition the Services included in the Contract on a schedule approved by HHSC in writing. Transition is complete once; (1) HHSC determines that the Contractor has successfully completed all Transition activities, and (2) HHSC provides written notice to the Contractor to proceed with the commencement of the Operations Phase.

Table 1: Transition Requirements		
TRA-01	The Contractor must assign no fewer than four (4) Key Personnel Staff, as identified in <u>Exhibit O, Job Descriptions</u> and submit contact information for each role via email to HHSC within one (1) Business Day of the Contract Execution Date, in accordance with DEL-10 (Key Personnel Staff Contact Information) .	
	Key Personnel Staff	
	Job Title	Number of Positions
	Project Manager	1
	Transition Manager	1
	Hiring Manager	1
	Invoicing Manager	1
	Total Key Personnel Staff	4

TRA-02	The Contractor must submit Qualified Candidate Package(s) to HHSC for review and approval no later than five (5) Business Days following the Contract Execution Date and must continue submissions on an ongoing basis until all Managed Services Staff roles are filled, per KPM-01 (Candidate Package Timeliness) and in accordance with DEL-04 (Qualified Candidate Package)		
TRA-03	The Contractor must achieve the required Managed Services Staff staffing levels during the Transition Phase per KPM-10 (Initial Staffing Achievement) and in accordance with DEL-02 (Transition Staffing Schedule) .		
	Managed Services Staff		
	Tier	Job Title	Number of Positions
	Tier 1-ITSD	Enterprise Service Desk (ESD) IT Support Specialist III	22
	Tier 1-ITSD	DFPS Service Desk IT Support Specialist III	10
	Tier 1-ITSD	TIERS IT/IEE Support Specialist III	5
	Tier 2-DSS	Deskside Support Systems Administrator II	14
	Tier 2-DSS	Deskside Services Team Lead	1
Total Managed Services Staff		52	
TRA-04	The Contractor must ensure all Key Personnel Staff and any other Contractor staff assigned to support contract management attend the HHSC-coordinated on-site post-award meeting within five (5) Business Days of the Contract Execution Date at: <i>701 W 51st Street, Austin TX, 78751</i> .		
TRA-05	The Contractor must support a Transition Phase of up to sixty (60) Calendar Days beginning on the Contract Execution Date and must continue to meet all applicable performance expectations throughout the Transition Phase as described in Table 8: Key Performance& Liquidated Damages .		
TRA-06	The Contractor must participate in weekly Transition Status Meetings scheduled and coordinated by HHSC per KPM-12 (Transition Governance Participation) .		

TRA-07	The Contractor must submit a Weekly Transition Status Report (Attachment J) to HHSC throughout the Transition Phase, per KPM-12 (Transition Governance Participation) and in accordance with DEL-01 (Weekly Transition Status Report) .
TRA-08	The Contractor must provide written acknowledgment of the HHSC approved <u>Exhibit R, Transition Staffing Schedule</u> submitted as part of the Solicitation Response per Article V, Narrative Proposal Requirements, Section 5.1.2 (Project Work Plan) , of this Solicitation in accordance with DEL-02 (Transition Staffing Schedule) .
TRA-09	The Contractor must provide written acknowledgment of the HHSC approved Operational Readiness Checklist (Attachment D) prior to the conclusion of the Transition Phase. In accordance with DEL-03 (Operational Readiness Checklist) written HHSC approval is required before the Operations Phase may commence.

1.2 Operations Phase Requirements

The Operations Phase consists of all contract requirements for ongoing functions including but not limited to:

- a. Staffing Requirements (STF);
- b. Onboarding & Security Requirements (OS);
- c. Staff Change Requirements (SC);
- d. Reporting & Meeting Requirements (RM);
- e. Invoice & Timekeeping Requirements (INT); and
- f. Performance & Compliance Requirements (PC).

1.2.1 Staffing Requirements

The Contractor must provide staffing Services that meet or exceed the requirements specified in **Table 2: Staffing Requirements**. Initial staffing ramp up during the Transition Phase is subject to **KPM-10 (Initial Staffing Achievement)**.

Table 2: Staffing Requirements

STF-01	The Contractor must ensure continuity of staffing for all Critical Roles throughout the term of the Contract per KPM05 (Critical Vacancy Duration) .
STF-02	The Contractor must ensure that all Qualified Candidates Packages proposed for consideration under this Contract are located within a fifty (50) mile radius of 701 W. 51st Street, Austin, Texas 78751 , and meet the requirements specified in <u>Exhibit O, Job Descriptions</u> prior to submission of each Qualified Candidate Package in accordance with DEL-04 (Qualified Candidate Package) .
STF-03	The Contractor must maintain a recruiting pipeline sufficient to meet Contract staffing requirements per KPM-11 (Recruiting Pipeline Sufficiency) .
STF-04	The Contractor must submit one (1) Qualified Candidate Package per HHSC request within five (5) Business Days of receiving a Managed Services Staff Request (Attachment F) per KPM-01 (Candidate Package Timeliness) and in accordance with DEL-04 (Qualified Candidate Package) .
STF-05	The Contractor must provide written acknowledgment of the approved Candidate Cover Sheet (Attachment H) before any individual is assigned to perform Managed Services Staff duties and must confirm the selected candidate's information to HHSC via email within two (2) Business Days of the candidate's acceptance notice, in accordance with DEL-04 (Qualified Candidate Package) and DEL-05 (Candidate Cover Sheet) .
STF-06	The Contractor must submit two (2) additional Qualified Candidate Packages per job position within five (5) Business Days of HHSC's written rejection of a Candidate Cover Sheet (Attachment H) and must continue submissions until HHSC approves a candidate per KPM-11 (Recruiting Pipeline Sufficiency) and in accordance with DEL-04 (Qualified Candidate Package) .

1.2.2 Onboarding & Security Requirements

The Contractor must provide Onboarding & Security Services that meets or exceeds the requirements specified in **Table 3: Onboarding & Security Requirements**.

Table 3: Onboarding & Security Requirements	
OS-01	The Contractor must provide headset equipment compatible with HHSC hardware and software including any necessary replacement headsets for all Managed Services Staff hired under this Contract prior to HHSC granting system access.
OS-02	The Contractor must ensure that all Managed Services Staff meet required background check and eligibility requirements. Additionally, Managed Services Staff assigned to the DFPS Service Desk must complete and clear a DFPS agency fingerprint-based background check (BGC) at Contractor's expense prior to accessing any DFPS systems, data, or agency information.
OS-03	The Contractor must provide a high-level ITIL Foundation (v4 or v5) overview and HIPAA overview training to all Managed Services Staff prior to the commencement of classroom and on-the-job training, per Candidate Acknowledgement of Requirements (Attachment A) . All training must be completed and verified by HHSC in accordance with KPM-04 (Training Completion) prior to granting system access.

1.2.3 Staff Change Requirements

The Contractor must provide Staff Change Requirement Services that meets or exceeds the requirements specified in **Table 4 (Staffing Change Requirements)**.

Table 4: Staffing Change Requirements	
SC-01	The Contractor must submit a Staff Change Notice using the Staff Change Master Notice Email Template (Attachment E) to HHSC, the separating Managed Services Staff member, and the relevant ITSDS or DSS point of contact via email at least five (5) Business Days prior to any planned separation and within two (2) Business Hours of an unplanned separation of Managed Services Staff with an explanation of the circumstances, in accordance with DEL-15 (Staff Change Notice) .

SC-02	The Contractor must provide two (2) Qualified Candidate Packages for replacement Managed Services Staff required to fill any separation at no additional cost to HHSC within five (5) Business Days of the written request per KPM-11 (Recruiting Pipeline Sufficiency) and in accordance with DEL-04 (Qualified Candidate Package) , using the Candidate Cover Sheet (Attachment H) and Candidate Acknowledgement of Requirements (Attachment A) .
SC-03	The Contractor must submit a Key Personnel Change Notice to HHSC via email at least five (5) Business Days prior to any planned separation of Key Personnel Staff change or within four (4) Business hours of an unplanned separation and must replace the vacant position within five (5) Business Days of the vacancy, per KPM-11 (Recruiting Pipeline Sufficiency) and in accordance with DEL-17 (Key Personnel Change Notice) .
SC-04	The Contractor must comply with HHSC's written direction to remove any Managed Services Staff within one (1) Business Day of receipt of such notice, or sooner if necessary, notwithstanding any other procedures described in this Contract.
SC-05	The Contractor must, upon HHSC's request, arrive at HHSC premises within two (2) Business hours to oversee the separation of any Managed Services Staff identified for removal.
SC-06	The Contractor must, upon HHSC's request, provide instruction to the Managed Services Staff regarding the applicable policy violation and the reason for separation.
SC-07	The Contractor must return all State property in the possession of departing Managed Services Staff in acceptable working order to the applicable agency leadership within two (2) Business Days of separation per KPM-03 (Equipment Return) and in accordance with DEL-08 (Equipment Tracking Log) .
SC-08	The Contractor must maintain all State property in a secure domain, such as a locked cabinet in Contractor's office space, until the equipment is returned to HHSC.

SC-09	The Contractor must submit a Property Damage Notice using Property Damage Notice Email Template (Attachment G) , to HHSC via email within one (1) Business Day of any loss, destruction, or damage of equipment or property, in accordance with DEL-16 (Property Damage Notice) .
SC-10	The Contractor must assume full liability to HHSC and the State for the full cost of repair, reconstruction, or replacement of any State of Texas owned, leased, or occupied property or equipment lost, destroyed, or damaged by the Contractor, its employees, agents, Subcontractors, or suppliers.
SC-11	The Contractor must reimburse HHSC and the State for any property damage within ten (10) Calendar Days of the Contractor's receipt of HHSC's or the State's written notice of the amount due.

1.2.4 Reporting & Meetings Requirements

The Contractor must provide Reporting & Meetings Services that meets or exceeds the requirements specified in **Table 5: Reporting & Meetings Requirements**.

Table 5: Reporting & Meetings Requirements	
RM-01	Contractor must schedule, facilitate, and support Monthly Metric Meetings and related governance activities in accordance with DEL-11 (Monthly Metric Meeting) per KPM-07 (Monthly Metric Meeting Compliance) .
RM-02	Contractor must distribute the Monthly Metric Agenda via email within two (2) Business Days prior to the meeting, in accordance with DEL-12 (Monthly Metric Agenda) per KPM-07 (Monthly Metric Meeting Compliance) .
RM-03	Contractor must provide an up-to-date copy of the Monthly Staff Report (Attachment C) to HHSC by the first (1st) Business Day of the month for previous months' candidates in accordance with DEL-06 (Monthly Staff Report) . The Monthly Staff Report (Attachment C) shall list all filled positions, training status updates, and vacancies per KPM-02 (Staffing Compliance Rate) and KPM-04 (Training Completion) .

RM-04	Contractor must complete and submit a Post Meeting Report (Attachment I) for each Monthly Metric Meeting in accordance with DEL-07 (Post Meeting Report) .
RM-05	Contractor must update and resubmit Post Meeting Report (Attachment I) in accordance with DEL-07 (Post Meeting Report) . In response to HHSC feedback revised reports must be submitted per KPM-06 (Post-Meeting Report Timeliness) .

1.2.5 Invoice & Timekeeping Requirements

The Contractor must provide Invoice & Timekeeping Services that meet or exceed the requirements specified in **Table 6: Invoice & Timekeeping Requirements**.

Table 6: Invoice & Timekeeping Requirements	
INT-01	The Contractor must submit timesheets weekly by Friday at 12:00 PM Central Time (or the next Business Day if a State or Federal holiday) per KPM-08 (Timesheet & Invoice Submission) and in accordance with DEL-13 (Timesheet Submission) .
INT-02	The Contractor must ensure all Monthly Invoices reflect only authorized work hours and match HHSC-approved timesheets and must submit any corrected invoices as required per KPM-08 (Timesheet & Invoice Submission) and KPM-09 (Invoice Accuracy) and in accordance with DEL-14 (Monthly Invoice) .
INT-03	The Contractor must submit all Monthly Invoices solely in the Contractor's name and using the Contractor's Texas Identification Number (TIN); HHSC will not remit payment on any invoice issued by or payable to a Subcontractor or any other entity per KPM-09 (Invoice Accuracy) and in accordance with DEL-14 (Monthly Invoice) .

1.2.6 Performance & Compliance Requirements

The Contractor must provide Performance & Compliance Services that meet or exceed the requirements specified in **Table 7:**

Performance & Compliance Requirements.

Table 7: Performance & Compliance Requirements	
PC-01	The Contractor must develop and submit a Corrective Action Plan (CAP) (Attachment B) to HHSC within five (5) Business Days of receipt of HHSC's written notification identifying a failure to meet Contract requirements, in accordance with DEL-09 (Corrective Action Plan (CAP)) .
PC-02	The Contractor must implement the HHSC-approved Corrective Action Plan (CAP) (Attachment B) within one (1) Business Day of written approval, in accordance with DEL-09 (Corrective Action Plan (CAP)) .

2.0 Key Performance Measures and Liquidated Damages

HHSC will monitor and evaluate Contractor performance throughout the Contract Term. Key Performance Measures (KPMs) are established to measure Contractor performance for contractual obligations subject to Service Level Occurrences identified in the table below and to assess Contractor's ability to meet required performance standards. In the event Contractor fails to perform or complete its obligations in accordance with the Contract, HHSC may, in addition to other remedies available under the Contract, impose contractual remedies including corrective action requirements, enhanced monitoring, additional reporting, and the assessment of liquidated damages in accordance with Texas law, as further described in this Contract.

The requirements listed in **Table 8: Key Performance & Liquidated Damages** below describe the Contract's Key Performance Measures and associated Liquidated Damages for instances of noncompliance. Additional operational performance metrics for Managed Services Staff are included in Exhibit P, Managed Services Staff Metrics.

A failure to meet a Key Performance Measure (KPM) threshold constitutes a Service Level Occurrence. Three (3) Service Level Occurrences within a rolling twelve (12) month period require submission of a **Corrective Action Plan (CAP) (Attachment B)** in accordance with **Table 7: Performance & Compliance Requirements** and **DEL-09 (Corrective Action Plan (CAP))**.

Table 8: Key Performance & Liquidated Damages			
KPM ID	KPM Name	KPM Description	Liquidated Damages
KPM-01	Candidate Package Timeliness	The Contractor must provide Qualified Candidate Packages to HHSC within five (5) Business Days of each written request. All resumes presented to HHSC must be for Qualified Candidates and must include all required candidate information in accordance with Contract requirements. Failure to submit within the applicable deadline constitutes a Service Level Occurrence. See: STF-04 , TRA02 , and DEL-04 .	\$100 per Business Day past the applicable deadline
KPM-02	Staffing Compliance Rate	The Contractor must ensure monthly staffing compliance of greater than or equal to eighty-five percent (85%) of the required Managed Services Staff complement, measured from the first Calendar Day through the last Calendar Day of each month. Staffing Compliance (%) is calculated as the number of staffed positions divided by total required positions, multiplied by one hundred (100). Any month in which compliance falls below eighty-five percent (85%) constitutes a Service Level Occurrence. See: RM-03 , and DEL-06 .	\$200 per Business Day below the required compliance level; three (3) Service Level Occurrences require submission of a CAP
KPM-03	Equipment Return	The Contractor must return all HHSC-owned equipment and peripherals in acceptable working order to HHSC within two (2) Business Days of any Managed Services Staff separation. Failure to return any item within the required timeframe constitutes a Service Level Occurrence. See: SC-07 , SC-09 , DEL-16 and DEL-08 .	\$200 per Business Day for each item not returned within the required timeframe
KPM-04	Training Completion	HHSC will withhold as credit thirty percent (30%) of payment for any Managed Services Staff classified in training status. The credit will be released upon the Managed Services Staff member's successful completion of all required training activities within forty-five (45) Calendar Days from the date of hire. Training completion status must be reported via DEL-06 , See: OS-03 .	Thirty percent (30%) credit is forfeited if training is not successfully completed within forty-five (45) Calendar Days from the date of hire

KPM-05	Critical Vacancy Duration	The Contractor must ensure that no Critical Role vacancy exceeds ten (10) Business Days in any calendar month. Each calendar month in which a Critical Role vacancy exceeds ten (10) Business Days constitutes one (1) Service Level Occurrence, regardless of the number of days exceeded or the number of affected Critical Roles. See: STF-01 .	One (1) Service Level Occurrence per calendar month in which a Critical Role vacancy exceeds ten (10) Business Days
KPM-06	Post-Meeting Report Timeliness	The Contractor must: (1) submit the Post Meeting Report (Attachment I) within two (2) Business Days after each Monthly Metric Meeting; and (2) provide any required revisions within two (2) Business Days of HHSC's written request. Failure to timely submit a Post Meeting Report (Attachment I) or required revision within the specified timeframe constitutes one (1) Service Level Occurrence per meeting cycle, regardless of the number of late days. See: RM-05 and DEL-07 (Post Meeting Report) .	One (1) Service Level Occurrence per meeting cycle for late submission or late revision
KPM-07	Monthly Metrics Meeting Compliance	The Contractor must: (1) hold the Monthly Metric Meeting no later than the fifteenth (15th) Calendar Day of each month; and (2) distribute the meeting Agenda to HHSC at least two (2) Business Days prior to the meeting. Failure to meet either requirement for a given month constitutes one (1) Service Level Occurrence per month, regardless of the number of missed governance elements. See: RM01 , RM-02 , DEL-11 (Monthly Metric Meeting) , and DEL-12 (Monthly Metric Agenda) .	One (1) Service Level Occurrence per month for failure to meet either the meeting timing or agenda distribution requirement

KPM-08	Timesheet & Invoice Submission	The Contractor must: (1) submit timesheets weekly by Friday at 12:00 PM Central Time (or the next Business Day if a State or Federal holiday); and (2) submit monthly invoices by the eighth (8th) Calendar Day of the month for the previous month's actual hours. Failure to timely submit any required timesheet or monthly invoice within the applicable reporting period constitutes one (1) Service Level Occurrence per reporting period, regardless of the number of late submissions within that period. See: INT-01, INT-02, DEL-13 (Timesheet Submission) and DEL-14 (Monthly Invoice) .	One (1) Service Level Occurrence per reporting period for any late timesheet or invoice submission
KPM-09	Invoice Accuracy	The Contractor must ensure that all invoices: (a) match HHSC approved timesheets; (b) do not include hours outside of authorized work hours; and (c) include correct payment information as required under the Contract. Submission of a monthly invoice containing unauthorized hours, discrepancies from HHSC-approved timesheets, or incorrect payment information constitutes one (1) Service Level Occurrence per invoice. HHSC may withhold payment for disputed line items until corrected. See: INT-02, INT-03 and DEL-14 (Monthly Invoice) .	One (1) Service Level Occurrence per invoice containing unauthorized hours, timesheet discrepancies, or incorrect payment information; HHSC may withhold payment on disputed items
KPM-10	Initial Staffing Achievement	The Contractor must assign the full required Managed Services Staff complement of fifty-two (52) positions within thirty (30) Calendar Days of the Contract Execution Date. Failure to achieve the required complement within thirty (30) Calendar Days constitutes one (1) Service Level Occurrence. See: TRA-03 , and DEL-02 (Transition Staffing Schedule) .	One (1) Service Level Occurrence for failure to achieve the 52-position complement within 30 Calendar Days of Contract Execution Date

KPM-11	Recruiting Pipeline Sufficiency	The Contractor must maintain a recruiting pipeline sufficient to meet Contract staffing requirements at all times. For Managed Services Staff positions, pipeline sufficiency is met when, upon HHSC request, candidate rejection, or staff replacement need, the Contractor submits at least two (2) Qualified Candidate Packages within five (5) Business Days and continues submissions as needed until HHSC approves a candidate. For Key Personnel Staff positions, pipeline sufficiency is met when the Contractor provides notice of the separation in accordance with DEL-17 (Key Personnel Change Notice) and fills the vacant Key Personnel position, with at least a temporary staff member, within five (5) Business Days of the vacancy. Failure to meet either requirement constitutes one (1) Service Level Occurrence per affected position. See: STF-03, STF-06, SC-03, DEL-04 (Qualified Candidate Package) and DEL-17 (Key Personnel Change Notice).	One (1) Service Level Occurrence per position request for failure to meet recruiting pipeline sufficiency requirements
KPM-12	Transition Governance Participation	During the Transition Phase, the Contractor must participate in one hundred percent (100%) of HHSC-scheduled weekly Transition Status Meetings and must support all Transition governance activities, including providing required status updates and action item follow-up, in accordance with Contract requirements. Each missed Transition Status Meeting or failure to provide required Transition status updates as scheduled by HHSC constitutes one (1) Service Level Occurrence. See: TRA-06, and TRA-07.	One (1) Service Level Occurrence per missed meeting or failure to provide required status updates as scheduled by HHSC

3.0 Deliverables

HHSC will use commercially reasonable efforts to review each Deliverable and provide written notice of acceptance or rejection within five (5) Business Days, unless additional review time is required due to the complexity of the Deliverable.

The requirements listed in **Table 9: Deliverable** below describe the Deliverable Requirements, due dates, and submission frequency for each contract deliverable.

Table 9: Deliverable				
Deliverable ID	Deliverable Name	Deliverable	Due Date/ Submission	Update Frequency
DEL-01	Weekly Transition Status Report	The Contractor must submit a Weekly Transition Status Report (Attachment J) documenting Transition activities, risks, issues, staffing status, and progress toward Operational Readiness. The report must be submitted via email to the HHSC Contract Manager or assigned representative each week during the Transition Phase. Each report must identify at a minimum, the reporting period, submission date, contractor representative, current transition status, issues requiring HHSC attention, and risks to successful transition completion. See: TRA-07, and KPM-12 (Transition Governance Participation).	Weekly during Transition Phase	Weekly
DEL-02	Transition Staffing Schedule (Exhibit R)	The Contractor must submit <u>Exhibit R, Transition Staffing Schedule</u> identifying staffing quantities, roles, and timelines, as part of the Contractor Solicitation Response per RFO Article V, Narrative Proposal Requirements, Section 5.1.2 (Project Work Plan). Updated Transition Staffing Schedules shall reflect actual staffing progress and cumulative staffed positions achieved as of the submission date. The Contractor must provide written acknowledgment of the HHSC-approved schedule via email to the HHSC Contract Manager or assigned representative. See:	Per Art. V §5.1.2	As needed during Transition

		TRA-03, TRA-08, KPM-10 (Initial Staffing Achievement), and KPM-12 (Transition Governance Participation).		
DEL-03	Operational Readiness Checklist (Attachment D)	The Contractor must complete the HHSC-provided Operational Readiness Checklist (Attachment D) provide written acknowledgment of its completion and submit to the HHSC Contract Manager or assigned representative via email prior to the Operations Start Date. HHSC written approval is required before the Transition Phase is considered complete. See: TRA-09 .	End of Transition Phase; prior to Operations Start Date	One-time

DEL-04	Qualified Candidate Package (per candidate)	The Contractor must submit one (1) Qualified Candidate Package per candidate to the HHSC Contract Manager or assigned representative via email. Each package must include, at a minimum: (1) Original Candidate resume; (2) Response to HHSC-specified requirements; (3) Candidate Cover Sheet (Attachment H); and (4) Signed Candidate Acknowledgement of Requirements (Attachment A). Initial packages must be submitted within five (5) Business Days of the (a) Contract Execution Date or (b) Receipt of Managed Services Staff Request (Attachment F). If HHSC rejects a Candidate Cover Sheet submission, the Contractor shall submit at least two (2) replacement Qualified Candidate Packages within five (5) Business Days of HHSC's written rejection and continue submissions as necessary until HHSC approves a candidate. Each Candidate Cover Sheet must specify if it is an initial, replacement, or resubmission tied to a previously rejected candidate. These sheets act as the evidentiary record for KPM-11 (Recruiting Pipeline Sufficiency) compliance. See: TRA-02, STF-02, STF-04, STF-05, STF-06, KPM-01 (Candidate Package Timeliness), and KPM-11 (Recruiting Pipeline Sufficiency).	Within five (5) Business Days of Contract Execution Date or receipt of Attachment F (Managed Services Staff Request)	As needed
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DEL-05	Candidate Cover Sheet (Attachment H)	The Contractor must submit a completed Candidate Cover Sheet (Attachment H) for each candidate proposed for Managed Services Staff assignment, documenting candidate details and assignment authorization, via email to the HHSC Contract Manager or assigned representative prior to staff assignment. The Contractor must provide written acknowledgment upon HHSC approval. This deliverable is included within DEL-04 (Qualified Candidate Package). but may be submitted independently for reapproval as needed. See: STF-05.	Prior to staff assignment	Per hire event
DEL-06	Monthly Staff Report (Attachment C)	The Contractor must submit a Monthly Staff Report using the HHSC Monthly Staff Report (Attachment C) listing all filled positions, training status updates, and vacancies, via email to the HHSC Contract Manager or assigned representative by the first (1st) Business Day of each month. The report must reflect the previous month's staffing data and comply with KPM-02 (Staffing Compliance Rate) , KPM-04 (Training Completion) , and KPM-07 (Monthly Metric Meeting Compliance) requirements. See: RM-03 .	1st Business Day of each month	Monthly
DEL-07	Post Meeting Report (Attachment I)	The Contractor must prepare and submit a Post Meeting Report (Attachment I) summarizing each Monthly Metric Meeting including decisions made and action items identified via email to the HHSC Contract Manager or assigned representative within two (2) Business Days following each meeting. Revised reports must be resubmitted within two (2) Business Days of any HHSC written request for revisions. See: RM-04 and RM-05 .	Within two (2) Business Days following each meeting	As needed

DEL-08	Equipment Tracking Log	The Contractor must submit an Equipment Tracking Log to the HHSC Contract Manager or assigned representative via email by the first (1st) Business Day of each quarter and within two (2) Business Days of any Managed Services Staff separation. The log must be submitted as a PDF file and identify all separating Managed Services Staff and associated State property which must include, at a minimum: (a) first and last name; (b) hardware; (c) software; (d) mobile device; (e) badge; (f) any other State property; (g) date each item was issued; (h) date of staff separation; (i) date each item was returned; (j) name of the State employee who received each item returned; (k) KPM-03 (Equipment Return) compliance metric measurement; and (l) contractor's written acknowledgment of property return. See: SC-07 , and SC-09 .	1st Business Day of each quarter/ within two (2) Business Days of any Managed Services Staff separation	Quarterly/ As needed
DEL-09	Corrective Action Plan (CAP) (Attachment B)	The Contractor must develop and submit a Corrective Action Plan (CAP) (Attachment B) to the HHSC Contract Manager or assigned representative via email within five (5) Business Days of HHSC's written notice of non-compliance. The CAP must address identified performance deficiencies and include specific corrective actions and implementation timelines. HHSC written approval is required before implementation. See: PC-01 , and PC-02 .	Within five (5) Business Days of HHSC notice	As needed
DEL-10	Key Personnel Staff Contact Information	The Contractor must submit contact information for all four (4) Key Personnel Staff — Project Manager, Hiring Manager, Invoicing Manager, and Transition Manager — via email to the HHSC Contract Manager or assigned representative within one (1) Business Day of the Contract Execution Date. See: TRA-01 .	Within one (1) Business Day of Contract Execution Date	One-time

DEL-11	Monthly Metric Meeting	The Contractor must schedule and facilitate a Monthly Metric Meeting with HHSC to discuss, at a minimum, compliance with Contract requirements, staffing levels, deliverable status, and action items. The meeting must be held no later than the fifteenth (15th) Calendar Day of each month. Meeting coordination must be communicated to the HHSC Contract Manager or assigned representative via email. See: RM-01 and KPM-07 (Monthly Metric Meeting Compliance) .	No later than 15th Calendar Day of each month	Per meeting
DEL-12	Monthly Metric Agenda	The Contractor must prepare and distribute a Monthly Metric Agenda to the HHSC Contract Manager or assigned representative via email at least two (2) Business Days prior to each Monthly Metric Meeting. The agenda must include, at a minimum: (a) review of the Monthly Staff Report including compliance and vacancy transparency; (b) staffing levels and any compliance below 85%; (c) feedback or approval of deliverables; (d) next steps, action items, and future meeting scheduling; and (e) certification of staffing data accuracy and proper attestation by Contractor representatives. See: RM-02 and KPM-07 (Monthly Metric Meeting Compliance) .	At least two (2) Business Days prior to each meeting	Per meeting
DEL-13	Timesheet Submission	The Contractor must submit accurate timesheets for all Managed Services Staff via the Contractor's designated timekeeping system, as approved by HHSC, with a copy submitted to the HHSC Contract Manager or assigned representative, every Friday by 12:00 PM Central Time (or the next Business Day if a State or Federal holiday). ITSDS Staff hours must match HHSC phone system records. See: INT-01 , and KPM-08 (Timesheet & Invoice Submission) .	Every Friday by 12:00 PM CT (next BD if State or Federal holiday)	Weekly

DEL-14	Monthly Invoice	The Contractor must submit a Monthly Invoice to the HHSC Contract Manager or assigned representative via email by the eighth (8th) Calendar Day of each month for the previous month's actual hours. The invoice must include, at a minimum: (a) Contractor's name; (b) Texas Identification Number (TIN); (c) Address, contact name, phone number, and payment address; (d) HHSC Contract number; (e) HHSC Contract Manager; (f) description of services provided; (g) Itemized actual hours worked per individual Managed Services Staff, broken down by month and grouped per Service Desk; (h) HHSC purchase order number; (i) Invoice total to date; and (j) Any credits itemized at the bottom of the invoice. If HHSC rejects or returns an invoice for correction, the Contractor shall submit a revised invoice that addresses all identified deficiencies and clearly identifies the changes made from the previously submitted version. The revised invoice must be submitted within five (5) Business Days of HHSC's notification unless otherwise directed by HHSC. See: INT-02, INT-03, KPM-08 (Timesheet & Invoice Submission), and KPM-09 (Invoice Accuracy).	8th Calendar Day of each month	Monthly
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DEL-15	Staff Change Notice	The Contractor must submit a Staff Change Notice using the Staff Change Master Notice Email Template (Attachment E) , via email to the HHSC Contract Manager, the separating staff member, and the relevant ITSDS or DSS point of contact. The notice must be submitted at least five (5) Business Days prior to any planned separation and within four (4) Business Hours of any unplanned separation. The notice must identify the separating staff member, effective separation date, circumstances of the separation, access suspension activities, equipment return activities, and replacement staffing actions, including the anticipated replacement timeline. See SC-01.	Planned separation: within five (5) Business Days; Unplanned separation: within four (4) Business Hours	As needed
DEL-16	Property Damage Notice (Attachment G)	The Contractor must submit a Property Damage Notice using the Property Damage Notice Email Template (Attachment G) via email to the HHSC Contract Manager or assigned representative within one (1) Business Day of any loss, destruction, or damage of State-owned equipment or property. See SC-09.	Within one (1) Business Day of loss, destruction, or damage	As needed
DEL-17	Key Personnel Change Notice	The Contractor must submit a written Key Personnel Change Notice to the HHSC Contract Manager or assigned representative via email within five (5) Business Day any planned Key Personnel Staff change or within two (2) Business Hours of an unplanned separation. The email notice must document: (a) the affected position; (b) the effective date of the change; (c) the reason for the change; and (d) confirmation of replacement within the five (5) Business Day vacancy. See SC-03.	Planned separation: within five (5) Business Days; Unplanned separation: within four (4) Business Hours	As needed