



TASK ORDER

AHCCCS TO# YH27-0049

AHCCCS PowerBI Consulting Services

Issue Date:	October 23, 2026
AHCCCS Procurement Officer:	Emmanuel Benjamin, Senior Procurement Officer Email: procurement@azahcccs.gov
Questions Due: ANSWERS TO QUESTIONS WILL BE SHARED FOR THE BENEFIT OF ALL POTENTIAL RESPONDENTS.	November 4, 2026 by 3:00 PM Arizona Time
TASK ORDER PROPOSAL DUE DATE:	November 23, 2026 by 3:00 PM Arizona Time

RESPONSE SUBMISSION REQUIREMENTS:

This task order is open to all Contractors under the following contracts: **Statewide Data Management Services, Category 2: Data Solution Consulting, Architecture, Support and Development** Any resultant award for this project will be added to your contract through purchase order release (for the Statewide contract). AHCCCS reserves the right to accept whole or partial responses from one or more respondents.

Please submit your response electronically via **email** to the procurement officer listed above. Make sure the subject line of your response email reads: **"AHCCCS Microsoft PowerBI Consulting Services Task Order"** along with your company's name.

Late responses will not be considered.

AHCCCS Microsoft Power BI Consulting Services Task Order

YH27-0049

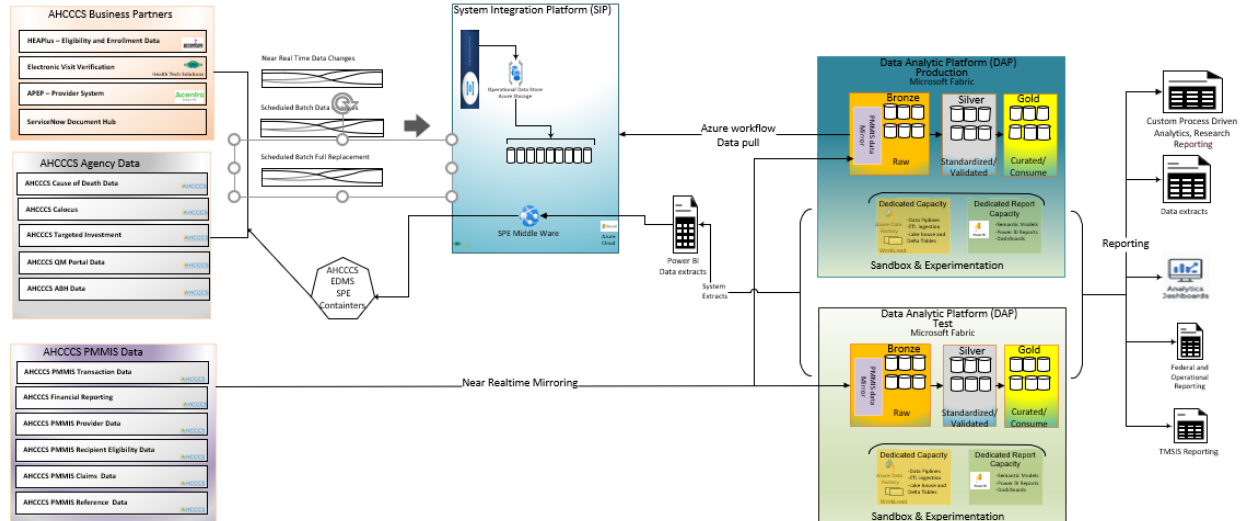
1. OVERVIEW

The Arizona Health Care Cost Containment System (AHCCCS) serves as the single state Medicaid agency for the State of Arizona. AHCCCS is responsible for the administration and oversight of Medicaid and related health care programs authorized under federal and state law, including programs operated pursuant to waivers, demonstrations, or other approvals granted by the Centers for Medicare and Medicaid Services (CMS), U.S. Department of Health and Human Services. For more information regarding AHCCCS see About Us: <https://www.azahcccs.gov/AHCCCS/AboutUs/index.html>

2. PROJECT DESCRIPTION:

2.1. AHCCCS is working toward a comprehensive and secure IT infrastructure designed to support its mission of delivering efficient, accessible healthcare services to millions of residents. Managed by the Information Services Division (ISD), this infrastructure will encompass a wide range of components, including development platforms, network and server architecture, enterprise security systems, and data management tools. Through the ISD team, AHCCCS ensures the reliability and scalability of its technical environment, compliance with federal and state regulations, and support for both legacy and modernized systems. This foundational infrastructure is critical to maintaining the integrity, performance, and adaptability of AHCCCS's healthcare delivery and administrative operations. Exhibit 1 illustrates the infrastructure to house the data architecture for AHCCCS.

Exhibit 1.0: AHCCCS Infrastructure



2.2. The System Integration System (SIP) provides access to the operational data in one location, reducing the time spent switching between the transactional data stores for separate systems to improve operations. The Operational Data Store (ODS) is designed with a focus specifically on operational reporting. This is the foundation and core of the SIP. It functions as a centralized, cloud-based data repository that supports both real-time data and near real-time data integration, operational reporting, and federal compliance. As the illustration shows, it houses the enterprise's information by consolidating key data from various legacy and modern systems and enabling more efficient data sharing across the enterprise. While changes are still in progress, it is designed to support real-time claims submission, eligibility verification, and data interchange with members and providers.

AHCCCS Microsoft Power BI Consulting Services Task Order

YH27-0049

- 2.3. The SIP solution will leverage API Manager, Azure Service Bus, and Azure Data Factory to create a secure and scalable data integration platform. The API Manager acts as the gateway for data access and governance. When an API call triggers a data operation, it can send a message to Azure Service Bus, which serves as a reliable messaging backbone to decouple systems and ensure smooth communication between services. Azure Service Bus provides reliable, decoupled messaging, and Azure Data Factory orchestrates data movement and transformation. This setup enables asynchronous processing, fault tolerance, and scalability, allowing organizations to manage complex data workflows while maintaining control and visibility through the API layer
- 2.4. The AHCCCS Data Analytic Platform (DAP) will modernize analytics by migrating legacy Cognos reports to Power BI. Leveraging Microsoft Fabric, Power BI, and OneLake, DAP will support unified data engineering, integration, and analytics, reducing silos and enabling efficient, self-service reporting. DAP will align current and future reporting needs by redeveloping critical reports and analytics assets within Power BI, leveraging Azure data services as appropriate to support reporting needs. Current reporting operations that occur within Cognos will be converted to PowerBI. The initiative includes converting and redesigning current Cognos reports to PowerBI, as well as supporting new reporting needs within PowerBI. Microsoft Fabric and Power BI will provide a unified platform for data engineering, integration, warehousing, data science, and business intelligence. Using OneLake as a central enterprise repository, DAP will support raw, standardized, curated, and transformed data through a medallion architecture while maintaining flexibility to support lambda architecture patterns for real-time and near-real-time analytics. This approach will reduce data silos and promote consistent enterprise data architecture.
- 2.5. This implementation prioritizes moving Cognos reports into the Power BI platform, as well as building new dashboards and reports from documentation and designs currently being created within the agency. The contractor must follow AHCCCS's structured data assets, reusable data products, and governed semantic models that support Power BI dashboards, Medicaid reporting, federal and state reporting, analytics, and future modernization initiatives. The task order will focus on Power BI report design and development. The solution must follow governance, security, application lifecycle management, CI/CD and DevOps processes, workspace administration, and scalable reporting foundations necessary to support Power BI growth.
- 2.6. AHCCCS currently manages data governance through Microsoft Purview. Although this task order does not require Purview implementation or administration, the solution must align with AHCCCS's existing governance framework, including metadata management, data classification, lineage, stewardship, and governance-ready data assets. The solution must integrate with Microsoft Purview to support PHI/PII classification, sensitivity labeling, data lineage, data loss prevention, auditability, and HIPPA privacy/security governance to support Agency adoption of Power BI.
- 2.7. Because the DAP will serve as a long-term enterprise capability, AHCCCS requires implementation services that include dashboard design guidance, governance alignment, documentation, training, and planning for operational readiness. The contractor will be responsible for hands-on configuration, development, deployment, testing, validation, and troubleshooting needed to implement the approved Power BI delivery methodology in

AHCCCS Microsoft Power BI Consulting Services Task Order YH27-0049

partnership with AHCCCS staff.

3. PURPOSE:

- 3.1. AHCCCS seeks a partner with deep experience in Cognos-to-Power BI migrations to guide the agency through the entire transition lifecycle. This includes inventory and analysis of existing Cognos reports, mapping and redevelopment in Power BI, robust testing and validation, user training, and change management. The contractor will help AHCCCS establish a sustainable and scalable Power BI reporting environment, ensuring continuity and improvement of Medicaid, federal, and state reporting, as well as broader analytics initiatives.
- 3.2. The scope of work includes converting the current reporting operations from Cognos to PowerBI, and supporting future reporting needs within PowerBI.

4. PROJECT TIMELINE:

- 4.1. Task Order Period: This task order will be awarded for an initial two (2) years with three (3) one-year optional extensions, for a total task order duration of five (5) years. The Task Order Periods are as follows (anticipated):
 - 4.1.1. Initial Award:
 - 4.1.1.1. **Project Phases:**
 - 4.1.1.1.1. **Assessment & Planning:** Inventory, compatibility, and readiness assessment of Cognos assets.
 - 4.1.1.1.2. **Migration & Development:** Review and assessment of existing Cognos reports and reporting processes, followed by either conversion to Power BI or development of improved reporting solutions leveraging Power BI best practices, enhanced visualizations, and modern analytics capabilities.
 - 4.1.1.1.3. **Testing & Validation:** Data quality validation, functional testing, performance testing and optimization of Power BI datasets, reports, and refresh processes, and user acceptance testing
 - 4.1.1.1.4. **Deployment & Training:** Production rollout, documentation, and end-user training.
 - 4.1.1.2. For each phase, the contractor must provide evidence of completion, including activity summaries, deliverables status, risk/issue logs, required decisions, test results, dependencies, readiness assessments, and recommended next steps.
 - 4.1.1.3. The awarded contractor shall commit to maintaining the statewide contract that this task order is attached to as may be extended or resolicited by the State Procurement Office. If a new solicitation is issued and a new contract is awarded, this Task Order will be moved from the olde contract to the new contract and will be governed by the terms and conditions of the new contract as may be updated.
 - 4.1.1.4. The awarded contractor must incorporate the activities identified in Section 4, Scope of Work, into the applicable project deliverables unless AHCCCS approves a standalone deliverable. At a minimum, deliverables must address reporting inventory, assessments, migration and conversion planning, governance and standards, roles and responsibilities, workload selection, processes and other activities as defined by AHCCCS.

AHCCCS Microsoft Power BI Consulting Services Task Order

YH27-0049

- 4.2. The contractor's responsibilities will focus on:
- 4.2.1. **Cognos Report Inventory and Assessment:** Review and validate the comprehensive inventory of existing Cognos reports, packages, data sources, schedules, distribution lists, security roles, and business logic. Assess report usage, complexity, and criticality to prioritize migration efforts.
 - 4.2.2. **Report rationalization and modernization strategy:** Analyze assessment findings and business requirements to evaluate the current reporting portfolio and determine the optimal disposition of each report, including migration, redesign, consolidation, replacement, or retirement. Identify opportunities to improve usability, performance, analytics capabilities, data visualization, and overall user experience through the effective use of Power BI.
 - 4.2.3. **Future-State solution Design:** Develop future-state design artifacts that define the recommended Power BI architecture, reporting framework, semantic model, security model, user experience, and migration roadmap. Document the target-state solution, implementation approach, and business rationale for approved modernization recommendations.
 - 4.2.4. **Report development in Power BI:** Execute the approved solution design by mapping Cognos report elements, business logic, data models, and security structures to Power BI equivalents or development of newly designed reports/dashboards.
 - 4.2.5. **Report Prioritization:** Establish the order of report development based on business prioritization and as approved by AHCCCS.
 - 4.2.6. **Data Integration and Preparation:** Where necessary, develop a request for necessary data pipeline and semantic models changes that are required to supply Power BI reports with clean, governed, and timely data.
 - 4.2.7. **Testing and Validation:** Support the state during user acceptance testing (UAT), performance testing, and data validation activities as needed to ensure migrated Power BI reports match or improve upon Cognos report outputs. Perform defect resolution as required.
 - 4.2.8. **Governance and Security Alignment:** Replicate and enhance approved security models within the Power BI solution.
 - 4.2.9. **Deployment and Lifecycle Management:** Establish automated deployment pipelines and lifecycle management practices for Power BI reports, datasets, and dashboards, ensuring reliability and scalability.
 - 4.2.10. **Knowledge Transfer and Change Management:** Deliver structured training and documentation to support end users and report developers in transitioning from Cognos to Power BI, including mapping documentation, best practices guides, and operational runbooks.

5. SCOPE of WORK

The Contractor shall for the following:

5.1. Cognos-to-PowerBI Data Architecture

- 5.1.1. Design and optimize a modern Azure-based data architecture to support Power BI reporting, replacing Cognos as the primary reporting platform. Responsibilities include:
 - 5.1.1.1. Creating future-state architecture design documents and solution diagrams that define the recommended Power BI reporting and analytics solution. This includes migration, modernization, consolidation, or replacement strategies for existing Cognos reporting functions.

AHCCCS Microsoft Power BI Consulting Services Task Order
YH27-0049

- 5.1.1.2. Designing and developing Power BI semantic models that preserve required business logic while modernizing data structures, calculations, metrics, and analytical capabilities where improvements are identified.
 - 5.1.1.3. Implementing data governance, security, and quality standards in the new reporting architecture.
 - 5.1.1.4. Collaborating with business users to ensure that all critical reporting needs formerly met by Cognos are addressed in Power BI.
- 5.1.2. **ETL/ELT Scope Boundary.** Pipeline-level extract, transform, and load (ETL/ELT) work — including source-system extraction into the Fabric Bronze layer and Bronze-to-Silver cleansing, conforming, and deduplication — is out of scope for this contractor and is the responsibility of the SI or a separately contracted Fabric data engineering vendor. The contractor's transformation responsibility begins at the Gold layer (or the ODS, for near real-time data) and is limited to semantic modeling and reporting-layer transformation within Power BI. This division follows Microsoft's own delineation of roles for the medallion architecture, in which data engineers own the design, build, and maintenance of the ingestion and transformation infrastructure across the Bronze/Silver/Gold stages, while BI and analytics teams own the consumption layer built on top of it.
- 5.1.3. Exhibit 2.0, below, assigns responsibility for each stage of the data pipeline and reporting lifecycle so that the Contractor, the SI/Fabric data engineering vendor, and the Agency have a shared, unambiguous understanding of scope at each phase.

AHCCCS Microsoft Power BI Consulting Services Task Order YH27-0049

Exhibit 2.0: PowerBI RACI

Activity	Responsible	Accountable	Consulted	Informed
Source system extraction (MMIS, claims, eligibility, etc.) into Fabric Bronze (raw ingestion)	SI / Fabric Data Engineering Vendor	Agency Enterprise Data Team		Power BI Vendor (Contractor)
Bronze → Silver transformation (cleansing, conforming, deduplication, key standardization)	SI / Fabric Data Engineering Vendor	Agency Enterprise Data Team		Power BI Vendor (Contractor)
Silver → Gold transformation (dimensional/business modeling, curated fact & dimension tables) in Fabric pipelines/notebooks	SI / Fabric Data Engineering Vendor	Agency Enterprise Data Team	Power BI Vendor (Contractor) — requirements input only	
ODS build, operation, and near real-time refresh (≤ 3-year data)	SI	Agency Enterprise Data Team		Power BI Vendor (Contractor)
Gold layer / ODS → Power BI semantic model (relationships, DAX measures, RLS, aggregations, DirectLake/DirectQuery/Import design)	Power BI Vendor (Contractor)	Agency Enterprise Data Team	SI / Fabric Data Engineering Vendor — consulted on source structure	
Report and dashboard development, Cognos migration, and training delivery	Power BI Vendor (Contractor)	Agency Enterprise Data Team		SI / Fabric Data Engineering Vendor

5.1.4. Key Outputs:

- 5.1.4.1. Maintain and refine the Cognos Report Inventory and Assessments
- 5.1.4.2. Mapping Documentation (Cognos to Power BI)
- 5.1.4.3. Azure/Power BI Data Architecture Design
- 5.1.4.4. Data Flow and Integration Diagrams
- 5.1.4.5. Semantic Data Modeling Standards
- 5.1.4.6. Power BI standards and operational processes

5.2. Power BI Report and Dashboard Development

- 5.2.1. Lead the redevelopment of Cognos reports and dashboards in Power BI, ensuring reports are interactive, visually compelling, and meet AHCCCS's business requirements. Responsibilities include:

AHCCCS Microsoft Power BI Consulting Services Task Order

YH27-0049

- 5.2.1.1. Recreating Cognos report logic, calculations, data packages, schedules, distribution lists and security in Power BI semantic models and datasets. Re-platforming of retained reports as native Power BI reports and dashboards, preserving or improving functional parity (filters, drill-through, subtotals, scheduling, and row-level security equivalents), not a one-for-one visual copy where Power BI native patterns are more effective.
- 5.2.1.2. A phased, wave-based migration approach provide documented validation supporting two paths: first the newly migrated reports require reconciliation against existing Cognos outputs; Secondly provide validation of newly designed dashboards against approved requirements, KPI definitions, source data, and acceptance criteria.
- 5.2.1.3. Design, develop, and maintain Power BI executive dashboards, operational dashboards, analyst-facing reports, and KPI scorecards that provide visibility into organizational performance, operational activities, service delivery metrics, trends, and key business outcomes for executive leadership, managers, and operational staff.
- 5.2.1.4. Optimizing performance and usability of Power BI reports.
- 5.2.1.5. Publishing and managing reports in the Power BI Service, establishing appropriate security controls, including workspace permissions and row-level security where required.
- 5.2.1.6. Supporting self-service analytics through reusable datasets and standardized reporting practices.
- 5.2.2. Key Outputs:
 - 5.2.2.1. Redeveloped Power BI Reports and Dashboards (replacing Cognos)
 - 5.2.2.2. Power BI Semantic Models and Dataflows
 - 5.2.2.3. Support User Acceptance Testing (UAT) Plans and Results
 - 5.2.2.4. Optimize and remediate reports/dashboards for performance
 - 5.2.2.5. Report Performance Metrics as defined by AHCCCS
 - 5.2.2.6. Dashboard and Reporting Training Materials
- 5.3. **Deployment, Integration and Lifecycle Management**
 - 5.3.1. Configure and manage the Power BI environment, ensuring seamless deployment, integration, and ongoing management of migrated reports. Responsibilities include:
 - 5.3.1.1. Establishing secure Power BI workspaces, access controls, and governance structures.
 - 5.3.1.2. Implementing automated data refresh schedules and CI/CD deployment pipelines for Power BI assets.
 - 5.3.1.3. Integrating Power BI with existing data sources, both cloud and on premises, to support migrated reports.
 - 5.3.1.4. Monitoring capacity, performance, and usage to ensure reliability and scalability.
 - 5.3.1.5. Documenting all deployment and integration processes for future maintenance.
 - 5.3.2. Key Outputs:
 - 5.3.2.1. Workspace and Access Control Configuration
 - 5.3.2.2. CI/CD Deployment Pipeline Documentation
 - 5.3.2.3. Automated Data Refresh and Monitoring Dashboards
 - 5.3.2.4. Integration Architecture Diagrams

AHCCCS Microsoft Power BI Consulting Services Task Order

YH27-0049

5.3.2.5. Security Audit and Compliance Reports

5.4. Knowledge Transfer

- 5.4.1. Ensure a smooth transition of reporting responsibilities to AHCCCS teams and business users.
 - 5.4.1.1. Delivering comprehensive training sessions for technical and business audiences, focused on Power BI capabilities and differences from Cognos.
 - 5.4.1.2. Providing detailed documentation on report mapping, new workflows, security models, and operational procedures.
- 5.4.2. This knowledge transfer approach enables internal teams to confidently manage, maintain, and enhance the solution while minimizing operational risk and dependency on external resources.
- 5.4.3. Key Outputs:
 - 5.4.3.1. End-User and Developer Training Sessions
 - 5.4.3.2. Mapping Documentation (Cognos to Power BI)
 - 5.4.3.3. Operational Runbooks and Support Guides
 - 5.4.3.4. Change Management and Adoption Plans

6. Governance and Alignment

The migration and PowerBI implementation must adhere to AHCCCS's existing data governance framework (including Microsoft Purview), covering metadata management, data classification, lineage, stewardship, and governance-ready data assets. The solution must align with all relevant security, compliance, and audit requirements.

7. Staffing

- 7.1. AHCCCS has identified key positions for this task order. The key roles, with descriptions and qualifications, are listed below. When appropriate, a single staff member may fulfill more than one required key role. The offeror must also propose an overall staffing structure that supports the requirements, specifications, and expectations in this Task Order. Therefore, the offeror is encouraged to propose staffing positions critical to the task order's success, whether or not those positions or descriptions are listed below.
- 7.2. AHCCCS reserves the right to review and approve key personnel, role assignments, staffing levels, substitutions, and material staffing changes. If an individual is proposed for multiple key roles, the awarded contractor shall demonstrate adequate capacity to perform all assigned responsibilities without impacting project quality, schedule, continuity, or deliverables. The awarded contractor must maintain sufficient staffing to meet all task order requirements and must not replace approved key personnel without prior written notice and AHCCCS approval, except in circumstances beyond the contractor's control.
- 7.3. The awarded contractor must identify the planned allocation, period of performance, responsibilities, and backup coverage for each key role. Any personnel replacement must be completed within an AHCCCS-approved timeframe and include appropriate knowledge transfer. Excessive turnover, extended vacancies, or inadequate staffing that jeopardizes project performance, deliverables, or acceptance requirements may be considered a performance issue and subject to corrective action under this task order.

AHCCCS Microsoft Power BI Consulting Services Task Order

YH27-0049

7.4. Project Manager

- 7.4.1. The awarded contractor shall provide recurring project management artifacts in the format and frequency approved by AHCCCS. Required artifacts include status reports, risk logs, issue logs, decision logs, action item logs, meeting agendas, meeting minutes, schedule updates, deliverable tracking reports, and change request tracking reports. The awarded contractor shall maintain these artifacts throughout the Task Order and submit them to AHCCCS on the agreed schedule or upon request. AHCCCS review of recurring project management artifacts does not waive AHCCCS rights to require correction, clarification, additional supporting information, or formal resubmission.
- 7.4.2. The project manager manages the project and serves as the chief liaison to AHCCCS for scope, schedule, and project activities. Project management includes the following:
 - 7.4.2.1. Contract administration and coordination of basic contractual/invoicing requirements.
 - 7.4.2.2. Project and scope coordination and management.
 - 7.4.2.3. Project scheduling and provision of resources.
 - 7.4.2.4. Formal communication and correspondence with stakeholders
 - 7.4.2.5. Primary point of contact for the contract, including deliverables, risk, issues, decisions, action items, etc.
 - 7.4.2.6. Responsible for the measurement and assessment of required project metrics (e.g., health, performance, quality).
 - 7.4.2.7. Responsible for managing contract resources including onboarding, training, assignments, etc.
 - 7.4.2.8. Responsible for keeping all phases of the program on time.
 - 7.4.2.9. Oversee, develop, and monitor the tools, processes, and procedures.
 - 7.4.2.10. Provide regular status reports.
- 7.4.3. **Required Qualifications:**
 - 7.4.3.1. 8+ years of experience managing multiple concurrent projects;
 - 7.4.3.2. Direct experience with Medicaid Enterprise;
 - 7.4.3.3. Experience managing implementation and operations of Medicaid or Major Health Care Payer projects;
 - 7.4.3.4. Working knowledge of Medicaid Transformation Initiative, MES Modernization, Heath IT and data analytics; and
 - 7.4.3.5. Experience managing multi-stakeholder projects, or similar complex integration efforts.

7.5. Power BI Developer / Power BI Analytics Lead

- 7.5.1. The Power BI developer/analytics lead is responsible for designing, developing, testing, publishing, and maintaining Power BI reporting solutions that provide actionable business insights. This role focuses on creating semantic models, dataflows, datasets, reports, and executive dashboards while supporting self-service analytics and enterprise reporting strategies. The developer collaborates with business stakeholders to turn data into meaningful visualizations and key performance indicators (KPIs).

AHCCCS Microsoft Power BI Consulting Services Task Order

YH27-0049

7.5.2. Required Qualifications:

- 7.5.2.1. 3+ years of experience developing Power BI reporting and analytics solutions.
- 7.5.2.2. Strong experience with: Power BI Desktop, Power BI Service, Dataflows, Semantic Models, DAX, and Power Query (M Language)
- 7.5.2.3. Experience developing executive dashboards and analytical reports is required.
- 7.5.2.4. A strong understanding of data modeling and reporting best practices is required.
- 7.5.2.5. Experience creating measures, key performance indicators (KPIs), calculated columns, and complex business logic.
- 7.5.2.6. Bachelor's degree in computer science, Information Systems or equivalent
- 7.5.2.7. Experience validating data quality and testing reporting solutions is required.
- 7.5.2.8. Strong communication and presentation skills are required.

7.6. Deployment & Integration Engineer / Power BI Platform Administrator

- 7.6.1. The deployment and integration engineer / Power BI platform administrator is responsible for configuring, deploying, securing, and maintaining Power BI and Microsoft Fabric environments. This role manages security boundaries, row-level security (RLS), capacity administration, automated refresh processes, deployment pipelines, and environment governance. The administrator ensures reliable, secure, and scalable analytics operations while supporting enterprise governance and compliance requirements.

7.6.2. Required Qualifications:

- 7.6.2.1. 3+ years of experience developing Power BI reporting and analytics solutions;
- 7.6.2.2. Strong experience with: Power BI Desktop, Power BI Service, Dataflows, Semantic Models, DAX, and Power Query (M Language);
- 7.6.2.3. Experience developing executive dashboards and analytical reports is required;
- 7.6.2.4. Strong understanding of data modeling and reporting best practices;
- 7.6.2.5. Experience managing Power BI Workspaces, Security Groups, Power BI Gateways, Capacity Administration, and Deployment Pipelines;
- 7.6.2.6. Bachelor's degree in computer science, Information Systems or equivalent;
- 7.6.2.7. Experience validating data quality and testing reporting solutions;
- 7.6.2.8. Understanding of Azure Active Directory (Entra ID), role-based access control (RBAC), and authentication methods is required; and
- 7.6.2.9. Strong communication and presentation skills are required.

7.6.3. Preferred Qualifications:

- 7.6.3.1. 3-5+ years Medicaid or public health data
- 7.6.3.2. Experience administering Power BI Embedded capacities
- 7.6.3.3. Knowledge of CI/CD tools such as Azure DevOps and GitHub
- 7.6.3.4. Experience implementing enterprise governance and compliance controls is required.
- 7.6.3.5. Familiarity with monitoring tools, capacity planning, and performance tuning.

AHCCCS Microsoft Power BI Consulting Services Task Order YH27-0049

- 7.7. In addition to the above key roles, the contractor must identify these SMEs and demonstrate access to the following competencies whether dedicated or combined:
- 7.7.1. Semantic Data Modeler;
 - 7.7.2. Analytics Engineer;
 - 7.7.3. QA / Test Lead;
 - 7.7.4. Medicaid Business Analysts;
 - 7.7.5. Performance Engineer;
 - 7.7.6. Change Management Lead; and
 - 7.7.7. Training Lead.

8. PROJECT DELIVERABLES with TIMEFRAMES/DUE DATES:

- 8.1. Exhibit 3.0 outlines the expected deliverables included in the scope of work. The awarded contractor will follow a deliverable submission review and acceptance process established by AHCCCS and must report deliverables by due dates to ensure compliance. AHCCCS may terminate the task order for default under applicable termination clauses in the statewide data management services contract after two notices of nonconformance to deliverable dates. AHCCCS will provide the contractor with access to applications as appropriate and will provide security forms and templates for status reporting, readiness scoring, and memo formats to align with internal governance.
- 8.2. Deliverables will be accepted when they:
- 8.2.1. Meet the requirements outlined in the description;
 - 8.2.2. Provide clear evidence, analysis, findings, and recommendations (if applicable);
 - 8.2.3. Include insight into defects, data quality issues, and remediations;
 - 8.2.4. Are delivered in approved formats (Word/PDF; optional Excel for metrics/defects); and
 - 8.2.5. AHCCCS provides written approval and acceptance of each deliverable
- 8.3. Services will be performed in a manner that ensures consistent alignment with State governance standards, and in alignment with established state and federal reporting requirements.

Exhibit 3.0: Deliverables

Deliverable Name	Description	Deliverable Due Date
Cognos Report Inventory and Assessment	A comprehensive inventory and assessment of all existing Cognos reports, dashboards, and related assets. This deliverable will document each report's business owner, usage frequency, associated data sources, security requirements, complexity, dependencies, and current state. Reports will be categorized and prioritized for migration based on business criticality, usage, and technical feasibility. The assessment will also identify any reports or report features that are obsolete, redundant, or candidates for consolidation in Power BI.	Initial submission due sixty (60) calendar days post task order Start Date. The contractor shall update and resubmit the Architectural Design Document for AHCCCS review and approval upon any approved material architecture change, phase gate, new major integration, security model change, or as requested by AHCCCS throughout the Task Order.

AHCCCS Microsoft Power BI Consulting Services Task Order

YH27-0049

Rationalization and Modernization Strategy Report	A strategic assessment document that identifies the optimal future-state approach for each Cognos report, including migration, redesign, consolidation, replacement, or retirement recommendations, along with supporting rationale, modernization opportunities, and implementation priorities	Initial submission due sixty (45) calendar days upon AHCCCS acceptance of the Cognos Report Inventory and Assessment.
Future State Solution Design	A design document that translates the approved Rationalization and Modernization Strategy into a target-state Power BI architecture, semantic model, data integration approach, security framework, governance standards, and migration roadmap. The document shall provide the design artifacts and implementation guidance necessary to support report migration, modernization, and redevelopment activities.	Initial submission due sixty (30) calendar days upon AHCCCS acceptance of the Rationalization and Modernization Strategy Report.
Power BI Report and Dashboard Development Progress Report	A recurring report that tracks the migration and redevelopment status of Cognos reports and dashboards in Power BI. This document will include a list of all reports, their migration status (e.g., not started, in progress, completed, validated), key issues or blockers, recent accomplishments, upcoming activities, and updated timelines. The report will provide transparency for stakeholders and facilitate project management and risk mitigation.	Initial report due thirty (30) calendar days after Task Order Start Date, and weekly thereafter through project close.
Cognos-to-Power BI Report Mapping and Redevelopment Plan	A detailed mapping document that outlines how each Cognos report, dashboard, and data model will be migrated or redeveloped in Power BI. For each asset, the plan will specify corresponding Power BI components (datasets, dataflows, visuals, security), identify any gaps or enhancements, and outline the redevelopment approach. The plan will address data source mappings, business logic translation, security equivalencies, and any necessary redesigns to leverage Power BI best practices and features. The deliverable will include a migration schedule with dependencies, resource assignments, and acceptance criteria.	Initial submission due in thirty (30) calendar days post task order Start Date. The contractor shall maintain and update the Plan throughout the project lifecycle, and as requested by AHCCCS.
User Acceptance Testing (UAT) and Validation Results	A comprehensive record of user acceptance testing (UAT) and validation activities comparing Power BI reports to their legacy Cognos counterparts. This deliverable will include test cases, validation criteria, test results, defects or discrepancies identified, remediation actions taken, and final user sign-off for each report or dashboard migrated. The documentation will ensure that business	User Training Results report due Within five (5) business days after each training session; monthly consolidated report if requested by AHCCCS. Final training results summary due Within ten (10) business days

AHCCCS Microsoft Power BI Consulting Services Task Order

YH27-0049

	requirements are met, and that Power BI outputs are accurate, reliable, and accepted by end users.	after the completion of the final scheduled training session.
Power BI Report Governance and Security Model Mapping	A detailed document outlining how Cognos report security, access controls, and governance structures are mapped and implemented within Power BI. This deliverable will describe the translation of Cognos roles, groups, and row-level security rules into Power BI's workspace, dataset, and report security configurations. The document will also specify governance standards for report certification, sharing, versioning, and auditability, ensuring compliance with	No later than thirty (30) calendar days prior to the first production Power BI report deployment. Updated as needed upon material changes or at AHCCCS request.
End-User Adoption and Change Management Plan	A formal plan that details the strategy, activities, and materials required to ensure successful adoption of Power BI by former Cognos users and other stakeholders. The plan will cover communication and engagement strategies, training approaches (including schedules, learning paths, and materials), user support mechanisms, feedback collection, phased cutover activities, and risk mitigation for user adoption challenges. The deliverable will also address plans for sunseting legacy Cognos reports after successful Power BI migration.	No later than sixty (60) calendar days after Task Order Start Date or at least ninety (90) days before first Power BI go-live, whichever is earlier. Update as needed for major changes or at AHCCCS request.
Project Management Plan (PMP)	The contractor shall prepare and deliver to the State for approval a detailed Project Management Plan (PMP) for the overall project, which conforms to industry project management standards and sufficiently addresses the challenges represented within a multi-contractor, integrated systems solution. The Project Management plan will govern overall project management for all phases of the project and will include a minimum: a) Communication b) Change Management c) Quality Management d) Risk & Issues Management e) Performance Management f) Staffing Management g) Budget Management h) Deliverables Reference	Initial submission due thirty (30) calendar days post task order Start Date. The contractor shall maintain and update the PMP throughout the Task Order upon approved changes to scope, schedule, staffing, communications, risks, issues, quality management, change control, reporting cadence, deliverable management, budget management, or as requested by AHCCCS.
Project Schedule	The Project Schedule shall include a baseline schedule and ongoing updates showing phases, milestones, deliverables, assigned resources by name,	Initial baseline schedule due thirty (30) calendar days post task order Start Date. The contractor shall maintain and

AHCCCS Microsoft Power BI Consulting Services Task Order
YH27-0049

	dependencies, review periods, AHCCCS acceptance points, staffing assumptions, risks, critical path items, phase gates, option-year updates, and recurring deliverables. The schedule shall be developed in collaboration with AHCCCS, approved by AHCCCS, maintained by the contractor, and reviewed with AHCCCS on the cadence approved in the PMP.	update the Project Schedule throughout the Task Order, at the cadence approved in the PMP.
Training Curriculum and Delivery Materials	The contractor shall provide a Training Curriculum developed in collaboration with the AHCCCS team, finalized, and submitted to the Agency for review and approval a minimum of sixty (60) days before any scheduled training delivery. The Training materials must be available in a format agreed to by the state, for use in a state-approved training repository and knowledge management system. Documentation provided shall include, but not be limited to: • Training Outline, identifying the learning objectives and target audience for each course • Systems Operations Manual, Instructor guides, participant guides. • User task-based job aids, fact sheets • Program policy requiring system updates/modifications • Online user tools or sites • Role based FAQs and troubleshooting steps • A knowledge check with answer key and noted pass/fail requirements	Initial curriculum due sixty (60) calendar days prior to any scheduled training delivery. The contractor shall maintain and update the Training Curriculum throughout the Task Order when training content, platform functionality, roles, operational procedures, job aids, knowledge checks, troubleshooting guidance, or AHCCCS-approved training needs change.
Staff Training Report	Report documenting each completed staff training, including training date, course title, audience or roles trained, participants or attendance evidence if available, materials used, trainer, learning objectives, knowledge check or evaluation results if applicable, questions raised, unresolved gaps, requested follow-up actions, and recommendations for additional training or knowledge transfer.	Due within five (5) business days after each completed training session or within the timeframe approved by AHCCCS for consolidated training reporting. The contractor shall update or supplement Staff Training Reports as needed to address corrected attendance information, follow-up actions, knowledge transfer gaps, additional sessions, or AHCCCS-

AHCCCS Microsoft Power BI Consulting Services Task Order

YH27-0049

		requested clarifications throughout the Task Order.
Knowledge Transfer and Operational Runbooks	Structured knowledge transfer documentation and operational runbooks to enable AHCCCS staff to independently manage, support, and enhance the Power BI environment post-migration. This deliverable includes step-by-step guides for common administrative and support tasks, troubleshooting procedures, escalation paths, report lifecycle management, and ongoing governance. It will also provide mapping between legacy Cognos processes and new Power BI workflows, ensuring a seamless operational transition.	No later than thirty (30) calendar days prior to project completion or Cognos decommissioning, whichever is earlier. Update as needed for significant changes or at AHCCCS request.

9. **EVALUATION CRITERIA:**

This Task Order will be evaluated on the following criteria, listed in their relative order of importance:

- 9.1. Experience and Capacity.
- 9.2. Methodology and Approach.
- 9.3. Pricing proposal.

10. **HOW TO RESPOND TO THIS TASK ORDER:**

- 10.1. Required Elements:
- 10.2. Cover letter with signature of authorized company representative, including statewide contract number, task order number, and contact information.
- 10.3. Name and contact information of the person responsible for response to this task order.
- 10.4. Experience and Capacity of the Firm and Key Personnel –
 - 10.4.1. Experience and Capacity of the Firm (limit 2 pages, excluding résumés)
 - 10.4.1.1. Knowledge and experience with projects of comparable size, scope and complexity.
 - 10.4.2. Experience of the proposed Key Personnel/Staff
 - 10.4.2.1. With this type of project,
 - 10.4.2.2. Provide list of names and classification of personnel expected to perform specific activities, including use of subcontractors; and
 - 10.4.2.3. Submit key staff résumés for work history for the last five (5) years, their roles in each position, and two (2) individual references for each key staff personnel assigned to the project. Include emails and contact information for references.
- 10.5. **Methodology and approach (Limit 10 pages)**
 - 10.5.1. Proposed methodology and approach to fulfilling the requirements of this project.
 - 10.5.2. Description of how you will satisfy each of the minimum criteria established.
 - 10.5.3. Description of required and any recommended deliverables.

AHCCCS Microsoft Power BI Consulting Services Task Order
YH27-0049

- 10.6. **Project Cost** – Complete Attachment A: Pricing Schedule and submit with your proposal. The costs should be inclusive of all deliverables and work to be performed under the Scope of Work.
- 10.6.1. The project cost not to exceed (NTE) amount is based on the proposal submitted. Billing shall be based on Deliverables in the Scope of Work, not to exceed agreed upon contracted total price.
- 10.7. Please submit your response electronically via **email** to the procurement officer listed on the front page with the subject line “**YH27-0049 Power BI Consulting Services**” along with your company’s name.

11. Request for Confidential/Proprietary Determination:

- 11.1. If an Offeror believes that a specific portion of its bid, proposal, offer, specification, or protest contains information that should be withheld from public inspection due to confidentiality, the Offeror shall submit to the Procurement officer a detailed legal analysis, prepared by legal counsel, which sets forth the bases for the requested non-disclosure and the specific harm or prejudice which may arise if disclosed. The analysis shall be presented to the Procurement Officer at the same time as the bid, proposal, offer, specification, or protest.
- 11.2. An entire bid, proposal, offer, specification, or protest shall not be identified as confidential; only those very limited and distinct portions which are considered by the Offeror as confidential may be identified as such. **NOTE: Contract terms and conditions, pricing, and information generally available to the public are not and will not be designated confidential information. DO NOT SUBMIT A REQUEST TO KEEP YOUR COST PROPOSAL CONFIDENTIAL.**
- 11.3. In the event that AHCCCS receives a request for disclosure of the information, AHCCCS will disclose the information in accordance with the law. Prior to disclosure, AHCCCS will inform the Offeror of such request and provide the Offeror a period of time to take action it deems appropriate to support non-disclosure. The Offeror shall be responsible for any and all costs associated with the nondisclosure of the information.
- 11.4. In addition to the required detailed legal analysis, the Offeror shall summarize in their Submittal Letter the distinct portions, including exact page numbers, of their document is requested to be kept confidential.
- 11.5. If any pieces of your proposal are being requested to be kept confidential, and withheld from public viewing, please submit an additional redacted copy of the proposal, clearly listed as REDACTED in the file name. This will ensure that our office is crystal clear on which version of your proposal is acceptable for public viewing.
- 11.6. Regardless of a determination issued by the procurement officer, all portions of the Offeror's proposal, even pages that are proprietary, may be provided to CMS or other state or federal oversight agencies.

AHCCCS Microsoft Power BI Consulting Services Task Order
YH27-0049

12. AWARD

- 12.1. AHCCCS anticipates awarding the task order to the Contractor(s) with the most advantageous response(s).
- 12.2. This project will be procured through Arizona Statewide Contract listed on page 1 of this task order. All terms and conditions of the statewide contract (the “base contract”) shall apply to this project.
- 12.3. AHCCCS may provide Protected Health Information (PHI) to the Contractor in connection with this task order. Therefore, the attached HIPAA Business Associate Addendum is incorporated into this Task Order (if applicable).
- 12.4. Confidentiality: **The** Contractor shall safeguard all information regarding this Task Order as confidential. The Contractor shall establish and maintain procedures and controls preapproved by AHCCCS for the purpose of assuring that information contained in its records or obtained from AHCCCS or others carrying out their functions related to this Task Order shall not be used or disclosed, except as required to perform duties under this Task Order.

13. INVOICING:

- 13.1. Invoices shall be electronically submitted to:
AHCCCS Accounts Payable AHCCCSDBFAdminPayables@azahcccs.gov
- 13.2. Each invoice shall have adequate supporting documentation attached as required by this Contract.
- 13.3. Each invoice shall provide the following information, as applicable:
 - 13.3.1. Statewide Contract number, Task Order number, and the Purchase Order number.
 - 13.3.2. Description of services performed for each fee and hours worked.
 - 13.3.3. Name of AHCCCS. Contact person for this task order.
 - 13.3.4. Date(s) services were performed.
 - 13.3.5. Adequate supporting documentation attached as required by this Task Order.
 - 13.3.6. Signature of authorized person.

HIPAA BAA

Updated April 2020

This Addendum is made part of this Contract between the Arizona Health Care Cost Containment System ("AHCCCS") and the Contractor, referred to as "Business Associate" in this Addendum.

AHCCCS and Business Associate agree that the underlying Contract shall comply with the Administrative Simplification requirements of the Health Insurance Portability and Accountability Act of 1996 ("HIPAA"), as set forth in Title 45, Parts 160 and 164 of the Code of Federal Regulations (the "CFR"), as amended. In the event of conflicting terms or conditions, this Addendum shall supersede the underlying Contract.

1. DEFINITIONS

The following terms used in this Addendum shall have the same meaning as those terms in the HIPAA rules set forth in Title 45, Parts 160 and 164 of the CFR: Breach, Data Aggregation, Designated Record Set, Disclosure, Health Care Operations, Individual, Minimum Necessary, Notice of Privacy Practices, Protected Health Information, Required by Law, Secretary, Security Incident, Subcontractor, Unsecured Protected Health Information, and Use.

2. OBLIGATIONS AND ACTIVITIES OF BUSINESS ASSOCIATE

Business Associate agrees to:

- 2.1. Not use or disclose protected health information ("PHI") other than as permitted or required by this Addendum or as required by law.
- 2.2. Use appropriate safeguards and comply with Subpart C of 45 CFR Part 164 with respect to electronic PHI, to prevent use or disclosure of protected health information other than as provided by this Addendum.
- 2.3. Report to AHCCCS any use or disclosure of PHI not provided for by this Addendum of which it becomes aware, including breaches of unsecured protected health information as required at 45 CFR §164.410, and any security incident of which it becomes aware in the following manner.
 - 2.3.1. Reporting. Business Associate shall report to AHCCCS any use or disclosure of PHI that is not authorized by the Contract, by law, or in writing by AHCCCS. Business Associate shall make an initial report to the AHCCCS Privacy Official not more than twenty-four (24) hours after Business Associate learns of such unauthorized use or disclosure. The initial report shall include all of the following information to the extent known to the Business Associate at the time of the initial report:
 - A. A description of the nature of the unauthorized use or disclosure, including the number of individuals affected by the unauthorized use or disclosure.
 - B. A description of the PHI used or disclosed.
 - C. The date(s) on which the unauthorized use or disclosure occurred.
 - D. The date(s) on which the unauthorized use or disclosure was discovered.

HIPAA BAA

- E. Identify the person(s) who used or disclosed the PHI in an unauthorized manner.
- F. Identify the person(s) who received PHI disclosed in an unauthorized manner.
- G. A description of actions, efforts, or plans undertaken by the Business associate to mitigate the harm of the unauthorized disclosure.
- H. A description of corrective actions undertaken or planned to prevent future similar unauthorized use or disclosure.
- I. An assessment of whether a breach, as defined in 45 CFR 164.402, including, if necessary, an assessment of the probability of harm, and
- J. Such other information, as may be reasonably requested by the AHCCCS Privacy Official.

Business Associate shall provide AHCCCS with supplemental reports promptly as new information becomes available, as assessments and action plans are developed, and as action plans are implemented. In any event, Business Associate shall provide a comprehensive written report including all of the information listed above no later than twenty (20) days after discovery of the unauthorized use or disclosure.

- 2.3.2. Mitigation. Business Associate agrees to mitigate, to the extent practicable, any harmful effect that is known to Business Associate of a use or disclosure of PHI by Business Associate in violation of the requirements of the Contract.
- 2.3.3. Sanctions. Business Associate shall have and apply appropriate sanctions against any employee, subcontractor or agent who uses or discloses AHCCCS PHI in violation of this Addendum or applicable law.
- 2.4. In accordance with 45 CFR §164.502(e)(1)(ii) and §164.308(b)(2), if applicable, ensure that any subcontractors that create, receive, maintain or transmit PHI on behalf of the Business Associate agree to the same restrictions, conditions and requirements that apply to the Business Associate with respect to such information;
- 2.5. Make available PHI in a designated record set to AHCCCS as necessary to satisfy AHCCCS' obligations under 45 CFR §164.524.
- 2.6. Make any amendment(s) to PHI in a designated record set as directed or agreed to by AHCCCS pursuant to 45 CFR §164.526 or take other measures as necessary to satisfy AHCCCS' obligations under 45 CFR §164.526.
- 2.7. Maintain and make available the information required to provide an Accounting of Disclosures to AHCCCS as necessary to satisfy AHCCCS' obligations under 45 CFR §164.528.
- 2.8. To the extent Business Associate is to carry out one of more of AHCCCS' obligations under Subpart E of 45 CFR Part 164, comply with the requirements of Subpart E that apply to AHCCCS in the performance of such obligation(s); and

HIPAA BAA

- 2.9. Make its internal practices, books and records available to AHCCCS and the Secretary for purposes of determining compliance with the HIPAA rules.

3. PERMITTED USES AND DISCLOSURES BY BUSINESS ASSOCIATE

- 3.1. Business Associate may only use or disclosure PHI as necessary to perform the services and obligations set forth in the underlying Contract.
- 3.2. Business Associate may use or disclose protected health information as required by law.
- 3.3. Business Associate agrees to make uses and disclosures and requests for protected health information consistent with Minimum Necessary, as required at 45 § CFR 164.502(b) and 164.514(d).
- 3.4. Business Associate may not use or disclose protected health information in a manner that would violate Subpart E of 45 CFR Part 164 if done by AHCCCS, except for the specific uses and disclosures set forth below (3.5 and 3.6).
- 3.5. Business Associate may use protected health information for the proper management and administration of the Business Associate or to carry out the legal responsibilities of the Business Associate; and
- 3.6. Business Associate may provide data aggregation services relating to the health care operations of AHCCCS.

4. PROVISIONS FOR AHCCCS TO INFORM BUSINESS ASSOCIATE OF PRIVACY PRACTICES AND RESTRICTIONS

- 4.1. AHCCCS shall notify Business Associate of any limitation(s) in the AHCCCS Notice of Privacy Practices (found at www.azahcccs.gov) under 45 CFR §164.520, to the extent that such limitation may affect Business Associate's use or disclosure of PHI;
- 4.2. AHCCCS shall notify Business Associate of any changes in, or revocation of, the permission by an individual to use or disclose his or her PHI, to the extent that such changes may affect Business Associate's use or disclosure of PHI; and
- 4.3. AHCCCS shall notify Business Associate of any restriction on the use or disclosure of PHI that AHCCCS has agreed to or is required to abide by under 45 CFR 164.522, to the extent that such restriction may affect Business Associate's use or disclosure of PHI.

5. TERM AND TERMINATION

- 5.1. Term: This Addendum is effective upon the effective date of the underlying Contract and shall terminate on the date AHCCCS terminates the contract for cause as authorized in paragraph (b) of this Section, or for any other reason permitted under the contract, whichever is sooner.

HIPAA BAA

- 5.2. Termination for Cause: Business Associate authorizes termination of the Contract by AHCCCS if AHCCCS determines that Business Associate has breached a material term of this Addendum and Business Associate has not cured the breach or ended the violation within the time specified by AHCCCS.
- 5.3. Obligations of Business Associate Upon Termination: Upon termination, cancellation, expiration or other conclusion of the Contract, Business Associate, with respect to PHI received from AHCCCS, or created, maintained, or received by Business Associate on behalf of AHCCCS, shall:
 - 5.3.1. Retain only that PHI, which is necessary for Business Associate to continue its proper management and administration or to carry out its legal responsibilities.
 - 5.3.2. Destroy or return to AHCCCS all remaining PHI that the Business Associate still maintains in any form.
 - 5.3.3. Continue to use appropriate safeguards and comply with Subpart C of 45 CFR Part 164 with respect to electronic PHI to prevent use or disclosure of the PHI, other than as provided for in this Section, for as long as Business Associate retains the PHI.
 - 5.3.4. Not use or disclose the PHI retained by Business Associate other than for the purposes for which such protected health information was retained and subject to the same conditions set out in this Addendum that applied prior to termination; and
 - 5.3.5. Destroy or return to AHCCCS the PHI retained by Business Associate when it is no longer needed by Business Associate for its proper management and administration or to carry out its legal and contractual responsibilities.
 - 5.3.6. Ensure compliance with state and federal records retention requirements for T-MSIS files, CMS correspondence, validation outputs, or historical submissions.
- 5.4. Survival: The obligations of Business Associate under this Section shall survive the termination of the Contract.

6. INDEMNIFICATION AND MISCELLANEOUS

- 6.1. Indemnification: Business Associate shall indemnify, hold harmless and defend AHCCCS from and against any and all claims, losses, liabilities, costs, civil and criminal penalties, and other expenses resulting from, or relating to, the acts or omissions of Business Associate, its employees, agents, and sub-contractors in connection with the representations, duties and obligations of Business Associate under this Addendum. The parties' respective rights and obligations under this Section shall survive termination of the Contract.
- 6.2. Regulatory References: A reference in this Addendum to a section in the HIPAA rules means the section as in effect or as amended.
- 6.3. Amendment: The parties agree to take such action as is necessary to amend this Addendum from time to time as is necessary for compliance with the requirements of the HIPAA rules or any other applicable law.

Interpretation: Any ambiguity in this Addendum shall be interpreted to permit compliance with the HIPAA rules.

End of Document

END OF SOLICITATION