

STATE OF CALIFORNIA  
CALIFORNIA DEPARTMENT OF AGING  
**CONTRACT SUMMARY OF CHANGES**  
CDA 9008 (NEW 6/16)

**Program:** HICAP  
**Contract Number:** MI-2324  
**Contract Term:** 9/1/2023 – 8/31/2024

| Section                        | Current Language in Existing Contract  | New/Amended Language in New Contract | Reason for Change                    | Editor's Name      |
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| Exhibit A.,<br>Article II.A.3. | <p>Contractors shall use One-Time Only (OTO) allocations to support the following MIPPA Priority Area activities.</p> <p>MIPPA Priority Area 1 (SHIPs)</p> <ol style="list-style-type: none"> <li>Enhance outreach to eligible Medicare beneficiaries with the greatest economic need and enroll those individuals in the programs for which they qualify. Increase one-on-one LIS and MSPs applications and/or submissions for those eligible Medicare beneficiaries.</li> <li>Enhance one-on-one application assistance for eligible Medicare beneficiaries specifically focused on those eligible for the LIS Medicare Part D program and MSPs.</li> <li>Develop new and/or innovative methods for reaching hard-to-reach populations.</li> </ol> <p>(continued)</p> <p>MIPPA Priority Area 2 (AAAs)</p> <ol style="list-style-type: none"> <li>Enhance outreach to eligible Medicare beneficiaries with the</li> </ol> | <p>Remove current language</p>       | <p>New Contract Term with no OTO</p> | <p>Mike Reaker</p> |

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|                                   | <p>greatest economic need and enroll those individuals in the programs for which they qualify. Increase one-on-one LIS and MSPs applications and/or submissions for those eligible Medicare beneficiaries.</p> <p>2. Enhance one-on-one application assistance for eligible Medicare beneficiaries specifically focused on those eligible for the LIS Medicare Part D program and MSPs.</p> <p>3. Develop new and/or innovative methods for reaching hard-to-reach populations.</p> <p>MIPPA Priority Area 3 (ADRC)</p> <p>1. Enhance outreach to eligible Medicare beneficiaries with the greatest economic need.</p> <p>2. Develop new and/or innovative methods for reaching hard-to-reach populations.</p> |  |  |                      |
| <b>Exhibit B<br/>Article II.D</b> | New  | <b>D. The Contractor shall submit a revised budget to CDA when one or the cumulative line item budget transfers exceed ten percent (10%)</b> | <b>Clarifying line item transfers mentioned in Article II.A.</b> | <b>Sara'Ann Ryan</b> |

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|                                      |   | of the total budget for each sub-cost category.   |  |               |
| <b>Exhibit B<br/>Article II.E</b>    | New   | E. The Contractor shall maintain a written record of all budget changes and clearly document line item changes. The records shall include the date, amount and purpose of the transfer. This record shall be available to CDA upon request and shall be maintained in the same manner as all other financial records.       | Clarifying line item transfer requirements.                      | Sara'Ann Ryan |
| <b>Exhibit B,<br/>Article II.G.1</b> | The maximum reimbursement amount allowable for indirect costs is ten percent (10%) of the Contractor's and/or Subcontractor's direct costs, excluding in-kind contributions and nonexpendable equipment unless there is an accepted negotiated rate. [45 CFR 75.414 (c) (1) and (f)]. | The maximum reimbursement amount allowable for indirect costs is ten percent (10%) of the Contractor's and/or Subcontractor's <b>modified total</b> direct costs ( <b>MTDC</b> ), excluding in-kind contributions and nonexpendable equipment unless there is an accepted negotiated rate. [45 CFR 75.414 (c) (1) and (f)]. | Clarifying direct costs included in the 10% indirect calculation | Sara'Ann Ryan |
| <b>Exhibit B,<br/>Article II.G.3</b> | Indirect costs exceeding the ten percent (10%) maximum may be budgeted as in kind and used to meet the minimum matching requirements (Title III and Title VII only).  | Remove  | Not applicable to the MIPPA program.                             | Sara'Ann Ryan |
| <b>Exhibit B,<br/>Article IV.C.1</b> | If Contractor requests reimbursement payment, CDA shall not advance one-sixth of the approved total allocated   | Remove  | Not needed. Exhibit B, Article IV.C already specifies            | Sara'Ann Ryan |

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|                                  | budget amount for the initial month of the Agreement. Payments shall be based on monthly expenditure reports as outlined in this section.  |  | requirement that Contractor shall notify CDA regarding payment method preference.   |               |
| <b>Exhibit B, Article IV.C.2</b> | If Contractor requests an advanced payment, CDA shall advance one-sixth of the approved total allocated budget amount for the initial month of the Agreement. Future payments shall be based on monthly expenditure reports as outlined in this section. | Remove   | Not needed. Exhibit B, Article IV.C already specifies requirement that Contractor shall notify CDA regarding payment method preference. | Sara'Ann Ryan |
| <b>Exhibit B, Article V.A</b>    | The MIPPA Financial Closeout Report and the Program Property Inventory Certification (CDA 9024) shall be submitted annually to the CDA Local Finance Bureau. All contractors must submit to CDA, Closeout Reports as instructed by CDA.                  | A. The MIPPA Financial Closeout Report shall be submitted annually to the CDA Local Finance Bureau. All contractors <b>are required to submit Closeout Reports electronically as instructed by CDA.</b><br><br><b>All contractors are required to submit a Program Property Inventory Certification annually, at the time of closeouts, to <a href="mailto:Property@aging.ca.gov">Property@aging.ca.gov</a> or as instructed by CDA.</b> | <b>Matching language to other contracts.</b><br><br><b>Streamlining processes to match submission of equipment reporting processes.</b> | Sara'Ann Ryan |
| <b>Exhibit B, Article V.C</b>    | Final expenditures must be reported to CDA in accordance with the budget display in Exhibit B. If the expenditures reported by the Contractor exceed the advanced amount, CDA will reimburse   | Final expenditures must be reported to CDA in accordance with the budget display in Exhibit B. If the expenditures reported by the Contractor exceed the advanced  | <b>To clarify CDA's ability to collect funds owed if</b>  | Stacey Shell  |

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|  | <p>the difference to the Contractor up to the contract amount. If the expenditures reported by the Contractor are less than the advanced amount, CDA will invoice the Contractor the unspent funds.</p> <p>The payment on the invoice is due immediately upon receipt or no later than 30 days from the date on the invoice.</p> | <p>amount, CDA will reimburse the difference to the Contractor up to the contract amount. If the expenditures reported by the Contractor are less than the advanced amount, CDA will invoice the Contractor the unspent funds.</p> <p>The payment on the invoice is due immediately upon receipt or no later than 30 calendar days from the date on the invoice.</p> <p>If payment is not received within 30 calendar days, CDA will collect payment from upcoming disbursements. To account for the collected funds from the outstanding invoice, the AAA will need to adjust records to move the funds already on hand from the previous year's contract to the current contract period.</p> | <p><b>invoices are not paid timely.</b></p> |                      |
| Exhibit D, Article I, Section A Item 5 | <p>"DUNS" means the nine-digit, Data Universal Numbering System number established and assigned by Dun and Bradstreet, Inc., to uniquely identify business entities.</p>   | <p>"UEI" means the Unique Entity ID - a 12-character alphanumeric ID assigned to an entity by SAM.gov on April 4, 2022. As part of this transition, the DUNS number has been removed from SAM.gov and entity registration, searching, and data entry in SAM.gov</p>  | <p>DUNS now replaced with UEI</p>           | <p>Amanda Towers</p> |

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|                                  |   | now require use of the new Unique Entity ID.  |                            |               |
| Exhibit D, Article II, Section M | <p>DUNS Number and Related Information</p> <p>1. The DUNS number must be provided to CDA prior to the execution of this Agreement. Business entities may register for a DUNS number at <a href="http://www.dnb.com/duns-number.html">http://www.dnb.com/duns-number.html</a>.</p> <p>2. The Contractor must register the DUNS number and maintain an "Active" status within the federal System for Award Management available online at <a href="https://www.sam.gov/portal/SAM/#1">https://www.sam.gov/portal/SAM/#1</a>.</p> <p>3. If CDA cannot access or verify "Active" status the Contractor's DUNS information, which is related to this federal subaward on the Federal Funding Accountability and Transparency Act Subaward Reporting System (SAM.gov) due to errors in the Contractor's data entry for its DUNS number, the Contractor must immediately update the information as required.</p> | <p><u>UEI Number and Related Information</u></p> <p>1. The Unique Entity Identifier changed from the DUNS Number to the Unique Entity ID (generated by SAM.gov) on April 4, 2022. The UEI number must be provided to CDA prior to the execution of this Agreement. Business entities may register for a UEI number at <a href="https://sam.gov/content/duns-uei">https://sam.gov/content/duns-uei</a>.</p> <p>2. The Contractor must register the UEI number and maintain an "Active" status within the federal System for Award Management available online at</p> | DUNS now replaced with UEI | Amanda Towers |

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|   |                                       | <a href="https://www.sam.gov/portal/SAM/#1">https://www.sam.gov/portal/SAM/#1</a> .<br><br>3. If CDA cannot access or verify "Active" status the Contractor's UEI information, which is related to this federal subaward on the Federal Funding Accountability and Transparency Act Subaward Reporting System (SAM.gov) due to errors in the Contractor's data entry for its UEI number, the Contractor must immediately update the information as required. |   |               |
| Exhibit D, Article V, Section I, Item 4 | No current language.                  | I. The Contractor shall, prior to the awarding of a subcontract to any for-profit entity, submit the   | Information regarding the AAA's RFP publicity is necessary to evaluate if the |               |

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|                                  |   | <p>following to CDA for review and approval:</p> <ol style="list-style-type: none"> <li>1. The Request for Proposal (RFP) or Invitation for Bid.</li> <li>2. All bid proposals received.</li> <li>3. The proposal or bid evaluation documentation, along with the Contractor's rationale for awarding the subcontract to a for-profit entity.</li> </ol> <p>[22 CCR 7362]</p> <p>Description and documentation of dissemination of information concerning the RFP to elicit adequate competition. [22 CCR 7356]</p>   | RFP process was equitable.  |               |
| Exhibit D, Article VI, Section A | <p>A. The Contractor shall maintain complete records which shall include, but not be limited to, accounting records, contracts, agreements, a reconciliation of the "Financial Closeout Report" (CDA Closeout) to the audited financial statements, single audit report, and general ledgers, and a summary worksheet identifying the results of performing an audit resolution of its subcontractors in accordance with Article X. of this Exhibit. This includes the following: Letters of Agreement, insurance documentation, memorandums and/or</p> | <p>A. The Contractor shall maintain complete records which shall include, but not be limited to, accounting records, contracts, agreements, a reconciliation of the "Financial Closeout Report" (CDA Closeout) to the audited financial statements, single audit report, and general ledgers, and a summary worksheet identifying the results of performing an audit resolution of its subcontractors in accordance with Article X. of this Exhibit. This includes the following: Letters of Agreement, insurance</p> | To improve submission timeliness and rates of the reconciliation. |               |



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|         | Letters of Understanding, patient or client records, and electronic files of its activities and expenditures hereunder in a form satisfactory to CDA. All records pertaining to this Agreement must be made available for inspection and audit by the State or its duly authorized agents, at any time during normal business hours. | documentation, memorandums and/or Letters of Understanding, patient or client records, and electronic files of its activities and expenditures hereunder in a form satisfactory to CDA. All records pertaining to this Agreement must be made available for inspection and audit by the State or its duly authorized agents, at any time during normal business hours. <b>The reconciliation of the CDA Closeout to the Contractor general ledger must be submitted with the CDA Closeout package.</b> |                   |               |
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