



**SAN FRANCISCO
HUMAN SERVICES AGENCY**

MEMORANDUM

TO: DISABILITY AND AGING SERVICES COMMISSION

THROUGH: KELLY DEARMAN, EXECUTIVE DIRECTOR

FROM: JILL NIELSEN, DEPUTY DIRECTOR
ESPERANZA ZAPIEN, DIRECTOR OF CONTRACTS

DATE: WEDNESDAY, MARCH 5, 2025

SUBJECT: NEW CONTRACT: EXCELLESOFT PARTNERS, LLC (FOR-PROFIT) FOR PROVISION OF REGISTRATION ENROLLMENT VIDEO APPOINTMENT (REVA)

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CONTRACT TERM: July 1, 2025 to June 30, 2028

	<u>Full Term</u>	<u>Contingency</u>	<u>Total</u>
CONTRACT AMOUNT:	\$43,920	\$4,392	\$48,312

	<u>FY 25-26</u>	<u>FY 26-27</u>	<u>FY 27-28</u>
ANNUAL AMOUNT:	\$14,640	\$14,640	\$14,640

	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
FUNDING SOURCE:	\$6,588	\$15,372	\$21,960	\$4,392	\$48,312

PERCENTAGE:	15%	35%	50%	100%
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The San Francisco Department of Disability and Aging Services (DAS) requests approval of a sole source waiver and authorization to enter into a new contract agreement with Excellesoft Partners, LLC for the period of July 1, 2025 to June 30, 2028, in the amount of \$43,920 plus a 10% contingency for a total amount not to exceed \$48,312. The purpose of this contract is to provide licensing access to Registration Enrollment Video Appointment (REVA).



Background

State law mandates the IHSS Program to require all Independent Providers to complete an enrollment process, which includes viewing a State produced video and the signage and collection of several documents. Prior to utilizing REVA, the IP enrollment process was entirely completed in person and usually required two plus hours of IHSS staff and office time for each enrollment. IHSS currently processes around 500 IP enrollments per month, making this process labor-intensive.

REVA is an online tool developed by Excellesoft, that streamlines the enrollment and processing of IPs who care for IHSS clients. REVA allows new IPs to remotely enter their personal information, watch the State-mandated video, and schedule an appointment with IHSS for a brief in-person enrollment meeting. At the in-person enrollment meeting, IHSS staff use REVA to upload and electronically sign State-mandated documents and print pre-populated Live Scan forms to give to IPs. REVA can also produce reports on IP enrollment for DAS staff's use. It is a Software as a Service (SaaS) application. REVA is a cloud-based solution where no equipment is provided by the contractor.

Along with several other California counties, San Francisco uses REVA to simplify and streamline the enrollment and processing of new IHSS Independent Providers. San Francisco has used REVA since May of 2012. Excellesoft, the developer and owner of REVA, provides on-going support.

Services to be Provided

Excellesoft will continue to provide and maintain the REVA system, which provides new IPs with an easy way to securely begin enrollment online, provides a staff workflow system, supports staff in using REVA, and provides continuing updates, improvements, and maintenance in conformance to updated State laws and other County driven initiatives. For additional details, please refer to Appendix A attached to this report.

Selection

The contractor was selected through Sole Source Provider (OCAWVR0011005) issued on January, 30, 2025.

Funding

Funding for this contract is provided through Federal, State, and County General Funds.

ATTACHMENTS

Appendix A, Scope of Services

Appendix B, Budget

Sole Source Memo

Appendix A
Excellesoft
Registration Enrollment Video Appointment (REVA)
July 1, 2025 to June 30, 2028

I. Purpose of Contract

Contractor will continue to provide a system to simplify and streamline the enrollment and processing of new In-Home Supportive Services (IHSS) Independent Providers (IP) using the Registration Enrollment Video Appointment (REVA) system. REVA is a fully-hosted, web-based IHSS Provider Orientation & Enrollment system. HSA will utilize REVA for all IP enrollments.

II. Definitions

Contractor	Excellesoft
HSA	Human Services Agency of the City and County of San Francisco
IHSS	In-Home Supportive Services
IP	Independent Providers
REVA	Registration Enrollment Video Appointment
SaaS	Software-as-a-Service

III. Description of Services

Contractor shall provide the following services during the term of this contract with the following components:

- A. Contractor will provide SaaS technology to support REVA.
 - 1. Hosting of secure web-based services
 - 2. All maintenance for web-based services
 - 3. Backup and recovery functionality for data and programming files

- B. Contractor will provide new IPs with an easy way to securely enroll online through REVA.
 - 1. Fill out an online Provider Information form to generate the SOC 426 Enrollment Form, SOC 846 Provider Agreement, and the Live Scan Application for fingerprinting
 - 2. Watch the state-mandated orientation video
 - 3. Schedule an appointment to sign the required documents
 - 4. Provide IP with access to draft documents
 - 5. Multiple language support (including at a minimum: Spanish)
 - 6. State-mandated Orientation Videos can be viewed in English, Spanish, Chinese, or Armenian
 - 7. Automatic 'forgot password' link

- C. Contractor will provide a staff workflow system through REVA, which will:
 - 1. Manage appointments
 - 2. Capture electronic signatures for the State of California (SOC) 426 and 846
 - 3. Scan the IP's social security card and identification card into the system as images
 - 4. Produce a printable packet of all required handouts along with copies of the signed documents

5. Enter and track the Live Scan application status
6. Generate a summary of IP information for entry into Case Management, Information and Pay-rolling System (CMIPS)
7. Scan additional documents as part of the IP's record
8. Generate reports to assist in managing and tracking the progress of enrollments
9. Maintain a comprehensive and updated training manual

D. Ongoing Maintenance of REVA

1. When there are changes to the IHSS IP program, as mandated by the State of California, Contractor will update REVA to reflect these changes
2. Contractor shall maintain compliance with state requirements to provide this IP enrollment system
3. Contractor shall maintain current and up-to-date software and security

IV. Location and Time of Services

- A. REVA shall be available as a secure internet-based web system to anyone with browser access over the Internet.
- B. REVA shall be accessible to Internet Users twenty four (24) hours per day, seven (7) days per week, with the exception of scheduled maintenance periods.
- C. If the server becomes unavailable to Users, other than for scheduled maintenance, Contractor shall have qualified personnel respond in the form of a service call in person to the server location within 1 hour of notification of such unavailability and shall, to the extent reasonably practical, remedy such unavailability at such time.
- D. Contractor warrants 99.9% platform availability on a monthly basis. (Our service level is 99.9% - in the current contract as such)
- E. Contractor is available for support Monday through Friday 8:00 am – 5:00 pm, except on State and Federal holidays. Initial contact for support may be via e-mail or by voicemail messaging. Contractor will use its best effort to provide a timely response to initial contact/response and issue resolution.

By E-mail: support@excellesoft.com

By Voicemail: (800) 914-4113

Contractor does not provide support to IHSS consumers or providers. Messages received from IHSS consumers or providers will be forwarded to the City.

V. HSA Responsibilities

The City will designate at least one user as a REVA System Administrator for the purposes of performing important functions that are specific to the City's daily operations and use of the system, such as user account creation and maintenance; resetting of passwords, setting of user permissions, office settings, setting the appointment calendars, etc., The REVA System Administrator is responsible for enforcing the rule of least privileges whereby a user's system permissions are set to be the minimal system permissions needed for the user to perform their job. Expertise in Information Technology is not required to be a REVA System Administrator.

The IHSS staff will:

- A. Enter data into REVA for IPs unable to use REVA
- B. Scan or upload social security cards
- C. Scan or upload identification cards
- D. Obtain electronic signatures or scan or upload signed copies of SOC forms.
- E. Provide document imaging
- F. Field basic support calls from IPs
- G. Ensure security of logins and passwords assigned to staff

VI. Other Requirements

- A. Contractor and HSA shall each designate a principal contact person who shall act as a liaison between Contractor and HSA and who shall have sufficient authority to grant or communicate the granting of all necessary approvals.

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President/CEO
6520 Lonetree Blvd. #1030
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1-800-914-4113 x 107
mark@excellesoft.com

Jessie Latch
Section Manager/ In-Home Supportive Services
PO Box 7988
San Francisco, CA 94120
415-557-5918
Jessie.Latch@SFgov.org

- B. All data entered or uploaded by HSA or IPs shall remain property of HSA. Contractor shall have no rights or privileges to database content, other than as required to implement contracted services and for the purpose of training, support and maintenance.
- C. Any domain name purchased specifically for SFHSA IP enrollments shall become property of SFHSA.
- D. Contractor shall provide a copy of the City data upon request or termination of contract, either through a secure electronic format (Secure File Transfer Protocol) or hard media.
- E. Service Credit: shall mean an amount equal to the pro-rata recurring charges for one monthly billing statement for Services for one (1) day of Service. In the event the City experiences Downtime, the City shall be eligible to receive from Contractor a Service Credit for each Downtime period with a maximum aggregate Service Credit of one-month's billing charges for all Downtime for incidents occurring during such month. Time related to Service Credit requests (including Downtime) will be measured from the issuance of a trouble ticket to trouble resolution. Trouble tickets will be issued upon the City's call to Contractor to report Downtime. In order to receive any of the Service Credits described in this Section, the City must notify Contractor within five (5) business days from the time the City becomes eligible to receive a Service Credit. Failure to comply with this requirement will forfeit the City's right to receive a Service Credit.

- F. **System Ownership:** Contractor is the developer and sole owner of REVA. All source code, system architecture, system design, database structure, database tables, system design concepts, system content, system user interfaces, system workflow, web page designs and content, screen designs, support documentation, training materials, help documents, help videos, and all technology and concepts developed by Contractor related to the operation and function of the system are the property of Contractor.
- G. **Non-Compete:** the City hereby acknowledges and agrees that the City will receive confidential information and trade secrets during the term of this Agreement. The City acknowledges that Contractor has a legitimate business interest in placing reasonable limits on the use of such information. Accordingly, during the Agreement term and for a two-year period following the term, the City shall not use, demonstrate, simulate, or describe the system in any manner (directly or indirectly) to any other individual, entity, institute, or organization for the purposes of developing, promoting, advertising, marketing, or providing a similar or competitive system.
- H. **Unauthorized System Access:** The City shall prevent their unauthorized individuals from accessing the system. The City agrees to not allow sharing of user accounts between multiple users. The City shall immediately deactivate a user account upon termination of a user, including during temporary suspensions, leave of absence, or any other change in employment status or job duties such that the user will not be actively working or employed for an extended or prolonged period. Access to the system requires manual entry of a user name, password, and validation of CAPTCHA text. The City shall not use automated tools, automated systems, single sign-on systems, or automated scripts to access the system or copy data from the system pages. The City shall not perform, or cause to be performed, penetration tests, security tests, or performance tests of any type on the system.
- I. **Per IP Fee:** As specified in Appendix C Calculation of Charges, REVA pricing includes a per-IP processing fee for each Independent Provider that has completed the processing in REVA. Processing is considered fully processed upon the completion of four key workflow steps.
- Scan or upload of Gov't ID.
 - Scan or upload of SSN card.
 - Electronic signature of SOC 426 or upload or scan of completed form.
 - Electronic signature of SOC 846 or upload or scan of completed form
- J. **Development of Additional System Functionality:** Development of additional system functionality shall be quoted on a time and material basis. All designs, drawings, source code, and database tables developed for additional system functionality, custom features, or reports shall become part of the system and will, therefore, become the property of Contractor and shall not be deemed as Deliverables or “works for hire.”

VII. Service Objectives

- A. Contractor will respond to system maintenance requests within one business day after the request has been submitted.
- B. Contractor will guarantee system availability seven days a week, 24 hours a day.
- C. Contractor will update system as soon as regulatory changes occur at the State level.
- D. Contractor will maintain and update software.

VIII. Outcome Objectives

- A. Data entered into REVA system will be reliable and be available to HSA staff for review of accuracy.
- B. REVA system will allow for scanning and storage of IP documents at no cost to HSA.
- C. REVA system will ensure strong customer service by allowing new IPs to enroll online at their own convenience.
- D. REVA system will save HSA storage space by not having to create a paper file for each IP.

Appendix B, Calculation of Charges
Excellesoft
 Registration Enrollment Video Appointment (REVA)
 July 1, 2025 to June 30, 2028

Contractor will invoice the City and County on a quarterly basis for actual services provided. As-needed services and pricing require prior approval of scope and project plan by the City’s REVA System Project Manager.

Description of Services	Fee	Rate	Annual Cost
System Subscription Fee	\$650/month, invoiced quarterly	\$1,950 per quarter	\$7,800
Independent Provider (IP) Processing: <ul style="list-style-type: none"> • Scan or upload of Gov’t ID & SSN card. • Electronic signature or upload or scan of completed form. 	\$1.00/IP Estimated 550 IPs per month, invoiced quarterly.	\$1,650 per quarter	\$6,600
Text Message Appointment Reminders	Based on 500 IP’s per month	\$20 per month	\$240
		Annual Total	\$14,640

Yearly Costs	FY 25/26	FY 26/27	FY 27/28	Total
System Subscription Fee	\$7,800	\$7,800	\$7,800	\$23,400
Independent Providers (IP)	\$6,600	\$6,600	\$6,600	\$19,800
Text Message Appointment Reminders	\$240	\$240	\$240	\$720
Total	\$14,640	\$14,640	\$14,640	\$43,920
Contingency				\$4,392
Not-to-Exceed				\$48,312

- I.** Contractor shall submit invoices on a quarterly basis, into CARBON, including monthly units for the Independent Providers (IP) processing.
- II.** The total amount of this budget for July 1, 2025 – June 30, 2028 is **\$43,920**.
- III.** At the City’s sole discretion, contingency amount up to **\$4,392** may be available.
- IV.** Total amount of the contract not to exceed is **\$48,312**



SAN FRANCISCO HUMAN SERVICES AGENCY

P.O. Box 7988
San Francisco, CA
94120-7988
www.SFHSA.org

Date: February 1, 2025
To: Dan Kaplan, Deputy Director, HSA
From: Patrick Garcia, Senior Contract Manger, HSA
RE: Sole Source Waiver request – Excellesoft to provide access to
Registration Enrollment Video Appoint (REVA) software

Department of Benefits
and Family Support

Department of Disability
and Aging Services

Registration Enrollment Video Appointment (REVA) is an online tool developed by Excellesoft, that streamlines the enrollment and processing of Independent Providers (IP) who care for In-Home Supportive Services (IHSS) clients. REVA allows new IPs to remotely enter their personal information and upload State-mandated documents for registration along with scheduling an appointment with IHSS/PA for fingerprinting. REVA can also produce reports on IP enrollment for HSA staff's use.

REVA is a cloud based service, where no equipment is provided by the contractor. REVA system also serves Kern, Marin, Monterey, Placer, Santa Clara, Santa Cruz, Solano, and Ventura Counties. No other similar type of service exists or is in use by other counties. Pricing is the same for all counties. The City has used REVA since May 2012, and currently processes around 400+ IP enrollments per month.

REVA is a proprietary system developed, operated and maintained exclusively by Excellesoft. Therefore, Excellesoft is the sole provider of REVA access.

The term of the contract will be July 1, 2025 to June 30, 2028.

DAS is proposing the following:

Request: To enter into a new contract with Excellesoft to provide access to Registration Enrollment Video Appointment (REVA) system for the period of July 01, 2025 to June 30, 2028 in the amount of \$43,920 plus a 10% contingency for a total amount not to exceed \$48,312. This software will streamline the enrollment and processing of Independent Providers (IP) who care for In-Home Supportive Services (IHSS) clients.
Brief description of services: Registration Enrollment Video Appointment (REVA) system assists in enrollment and processing of new IHSS IP applicants. REVA can also produce reports on IP enrollment for HSA staff's use.
Duration: July 1, 2025 to June 30, 2028 (three years)
Justification for Sole Source: REVA is a proprietary system that is developed, operated and maintained by Excellesoft. In addition, the city has used REVA since May 2012.



Daniel Lurie
Mayor

Trent Rhorer
Executive Director, SFHSA

Kelly Dearman
Executive Director, DAS



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Reporting Requirements: HSA will develop a report and recommendations at the end of the contract period.

Compliance: The contractor will meet the normal city requirements for contracting.

Approved Disapproved

A handwritten signature in blue ink, appearing to read "Dan Kaplan".

Dan Kaplan, Deputy Director of Administration and Finance

