



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

**Memorandum**

**To:** Disability And Aging Services Commission

**Through:** Kelly Dearman, Executive Director

**From:** Cindy Kauffman, Deputy Director  
Esperanza Zapien, Director of Contracts

**Date:** Wednesday, June 3, 2026

**Subject:** New Contract: **Collabrios** (For-Profit) for provision of CA-GetCare

DS  
EB

	<u>Full Term</u>	<u>Contingency</u>	<u>Total</u>		
<b>Contract Term:</b>	7/1/26				
	6/30/30				
<b>Contract Amount:</b>	\$2,135,955	\$213,596	\$2,349,551		
<b>Annual Amount:</b>	<u>FY 26-27</u>	<u>FY 27-28</u>	<u>FY 28-29</u>	<u>FY 29-30</u>	
	\$512,745	\$526,628	\$540,927	\$555,655	
<b>Funding Source:</b>	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
	\$2,135,955			\$213,596	\$2,349,551
<b>Percentage:</b>	100%				100%

The Department of Disability and Aging Services (DAS) requests authorization to approve a sole source waiver and new contract agreement with Collabrios for the period of July 1, 2026, to June 30, 2030, in the amount of \$2,135,955 plus a 10% contingency for a total amount not to exceed \$2,349,551. The purpose of this contract is to provide access to CA-GetCare.



## Background

DAS requires a dedicated database system as a means for tracking and reporting of program performance across its approximately 250 grants for community-based services as well as information and referral services provided at the DAS Benefits and Resources Hub. The data collected through this system is needed to meet many purposes, including: tracking and measuring performance levels, analysis of demographic and enrollment data to understand need and participation rates, compliance with fiscal, budget, and contracting reporting requirements tied to multiple funding sources, and facilitating the connection of people in need with services designed to help.

The performance data collected through a database system serves as a cornerstone for the development of the rich library of reports and analyses regularly published by the Department. Collection of this data helps the Department make data-informed decisions as we position services to most effectively engage and serve the people of San Francisco. Collection and reporting of data is also critical to meeting compliance requirements of local, State, and Federal funding sources.

The software needs to meet all these requirements are complex. It includes the storage and management of hundreds of thousands of client records and millions of service unit data each year. The ability to effectively retrieve, sort, and analyze data from this database is required. Significant flexibility and customization within the software is needed as the scope and type of data to be collected and managed can vary by service type and funding source.

## Services to be Provided

Collabrios will provide access to its proprietary software system allowing for DAS to meet the above-mentioned needs: tracking, coordinating, management, and reporting of program services for DAS programs and DAS funded community-based services. Collabrios will provide customization and support to tailor this software to DAS needs, with this customized system named “SF DAS GetCare.”

In addition, Collabrios will provide ongoing support including additional customization, technical support, data integration, data analysis, reporting function, updates, and training resources for the Collabrios database systems and services included in this contract.

## Selection

The contractor was selected through a sole source waiver (OCAWVR0013267), which was approved on April 27, 2026 and is proprietary software. Admin Code 21.30: Proprietary Software Licenses and Support and Proprietary Equipment.

## Funding

Funding for this contract is provided through County General Funds.

## Attachments

Appendix A, Scope of Services  
Appendix B, Budget  
Sole Source Memo



## Appendix A – Scope of Services

### Collabrios

### SF DAS GetCare

July 1, 2026 – June 30, 2030

**I. Purpose of Contract**

The purpose of this contract is for provision of web-based information system to track services provided by DAS funded contracts.

**II. Definitions**

AAA	Area Agency on Aging: a public or private nonprofit agency designated by a state to address the needs and concerns of older persons at the regional and local levels
CalAIM	California Advancing and Innovating Medi-Cal (CalAIM) is a statewide initiative aimed at transforming and improving the Medi-Cal program in California. It focuses on addressing the social determinants of health, enhancing services, and improving care delivery for Medi-Cal recipients, particularly those with complex health and social needs. CalAIM includes a range of reforms, such as expanding access to managed care, integrating physical and behavioral health services, and offering additional services like enhanced care management and community-based long-term services and supports.
CARS	California Aging Reporting System: a software system used to transmit National Aging Program Information to the California Department of Aging.
CDA	California Department of Aging
CHAMPSS	Choosing Healthy Appetizing Meal Plan Solution for Seniors: a program through which participants get meals from a dietitian-approved menu at specified area restaurants
CLFP	Community Living Fund Program: a program to connect individuals to needed medical and psychosocial services that will support independent living
CollabriOS	CollabriOS Health: this vendor
DAS	San Francisco Department of Disability and Aging Services
DPH	San Francisco Department of Public Health
HDM	Home Delivered Meals: a program that provides meals to participants who cannot prepare or obtain nutritionally adequate meals for themselves
HSA	Human Services Agency of San Francisco



IHSS	In-Home Supportive Services: a program that offers housecleaning, meal preparation, laundry, personal services, accompaniment to medical appointments, and protective supervision to Medi-Cal eligible and low-income older and disabled adults
I&R/A	Information and Referral / Assistance: a program which provides information, referral, assistance, and options counseling to those seeking services
OAAPS	Older Americans Act Performance System: service utilization and demographic data that is reported by local Area Agencies on Aging to the states to comply with federal Administration for Community Living (ACL) reporting requirements for submission of annual performance reports
PACECare Online (PCO)	PACECare Online (PCO) is a web-based data management system designed for the Community Living Fund Program. It supports the full client lifecycle by streamlining referrals, outreach, intakes, assessments, enrollments, care plans, progress notes, and service billing. The platform also offers robust reporting tools that help monitor data quality, track performance measures, and evaluate overall program outcomes.
SaaS	Software as a Service: a method of software delivery and licensing in which software is accessed over the internet via a subscription, rather than bought and installed on individual computers

**Item 1: Development and Customization**

**Item 1:** Additional development and customization as needed and agreed to by CollabriOS and DAS for the CA-GetCare platform.

**Charge Items:**

- To be established on an ‘as needed’ basis
- Prior to implementation of customization work, both parties to develop written proposals including at minimum: cost, details of customization, and timeline for completion of requested work.
- Both parties must agree to developed written proposals prior to start of work.

**FY 2026-27 Budget: \$50,000**

**FY 2027-28 Budget: \$50,000**

**FY 2028-29 Budget: \$50,000**

**FY 2029-30 Budget: \$50,000**



## **Item 2: CA-GetCare Information System Hosting and Support**

Item 2: SF DAS GetCare System Hosting and Support – The SF DAS GetCare platform will be a single platform inclusive of currently operating systems described in 2a, 2b, and 2c below.

**Item 2a: Integrated Housing component** – This component maintains a database of clients housed in units managed by the DAS scattered-site housing vendor. It automatically pulls client information from the Community Living Fund Program (CLFP) database. CLFP users can transmit referral information to the Integrated Housing component by selecting a simple tick box within the CLFP data platform. The component includes a client database and a housing unit database, as well as a tracking system for documenting move-in and move-out information. It also offers operational reports that allow DAS to monitor housing and client information in real time. All data are stored in the back end of the component and can be accessed through expanded reports, as well as ad hoc reports upon request.

**Item 2b: CA-GetCare service management component** – This component supports multiple operational areas: managing client data, including all OAAPS-required data elements and nutritional and functional assessments; managing service data using either a daily or monthly input screen; barcode scanning for client-level service recording; a client facing portal for the CHAMPSS food program and a CHAMPSS application management system; interface with the California Aging Reporting System (CARS) allowing seamless integration with the statewide CARS reporting system (obviating the need to upload quarterly files), and meeting all current and future CDA specifications for data reporting; a case management tool that supports the daily operational needs of DAS-funded community-based case managers; and generating operational/outcome reports using a library of standard reports designed to support common AAA business needs, as well as an ability to create custom report templates, export select client data elements, and periodic special data requests.

**Item 2c: Integrated Intake Service Management** – This tool includes I&R/A, integrated intake, and waiting list tools. It includes the ability to conduct basic assessments, identify appropriate services, make referrals, place these referrals on a waiting list and/or track their progress. Referrals to CLFP, Home-Delivered Meals, IHSS, Case Management, and Public Conservator are made from the module directly to the programs. CLFP referrals populate the PACECare Online tool with specified data from the intake.

Tool shall include a public facing online referral on a secure cloud-based portal for submission to the DAS staff. Referral format shall allow for easy review of information,



## SAN FRANCISCO HUMAN SERVICES AGENCY

determination of eligibility, and the ability to take subsequent actions on referral including withdrawing the referral, to placing it on a waiting list, to forwarding referral information into CA-GetCare program enrollment function. Staff can view service enrollments and other historical data relevant to the referrals.

**Item 2d: CalAIM Data Processing Component.** DAS provides Enhanced Care Management (ECM) and Community Supports (CS) services through contracts with San Francisco Health Plan (SFHP) as part of the CalAIM initiative. Under this component, CallbriOS will maintain an automated system to implement all required data management and transfers among SFHP, DAS, and Community Living Fund Program (CLFP). This includes retrieving monthly ECM eligibility files from SFHP's Secure File Transfer Protocol (SFTP) platform and uploading new referral data into the "ECM File Manager" within the I&R module of SF DAS GetCare. Client data shall be transferrable from the ECM File Manager to the "Intake Manager" by the DAS staff, where staff conduct a screening process, document intake status and notes, and refer eligible ECM clients to CLFP's data system. CallbriOS will also provide SFHP with monthly ECM enrollment files containing updated client status information. These monthly enrollment files will be made available to DAS via the City's SFTP platform. For monthly CS authorization files, CallbriOS will retrieve these files from SFHP's SFTP platform and update the relevant client information in CLFP's data system.

CallbriOS will be responsible for submitting monthly claim documents to SFHP for all ECM- and CS-related services rendered by both the DAS Intake Unit and CLFP. The claim documents will also be provided for DAS on the City's SFTP platform.

CallbriOS shall be responsible for resolving all file errors and underlying systemic issues in a timely manner to minimize impacts on program operations, claims processing, and revenue generation. Within one week of identification of errors and systemic issues, CallbriOS shall provide a timeline for resolution. The data system specifications shall also be updated as needed to comply with changes to CalAIM requirements.

### **Charge Items:**

- Ongoing software as a service (SaaS) hosting / maintenance costs
- Ongoing compliance with OAPPS reporting requirements
- Ongoing integration (file transfers) with the statewide CARS system
- Ongoing technical support
- Periodic training for end-users, as needed



**SAN FRANCISCO  
HUMAN SERVICES AGENCY**

**FY 2026-27 Budget: \$438,025**

**FY 2027-28 Budget: \$451,166**

**FY 2028-29 Budget: \$464,701**

**FY 2029-30 Budget: \$478,642**

**Item 3: Data Export Monitoring / Maintenance**

**Item 3: Data Export Monitoring and Maintenance** – CallbriOS will manage and maintain the transfer of DAS data from CallbriOS systems to HSA/DAS data warehouse on a monthly basis. CollabriOS will continue coding process that automatically and securely sends the raw (non-normalized) database to an HSA/DAS Amazon Web Services (AWS) instance on a regular basis. During the transmission, City data will not leave the secure AWS environment.

HSA/DAS will be responsible for all AWS fees charged to its account, including those for moving or processing data within its own instance. HSA will receive a copy of raw production data; pricing does not include creating a normalized dataset or a dataset meeting a set of HSA-specifications, nor does it include documentation or consulting to decode raw data fields.

**Charge Items:**

- Testing migration, including load-balancing and replication
- Paying ongoing AWS fees for storage, processing, and services
- Completion of data transfer on a monthly basis, or changed timeline upon agreement of CollabriOS and DAS
- Using AWS & partner services to continually monitor security and responsiveness
- Monitoring replication to City AWS instance and addressing issues

**FY 2026-27 Budget: \$24,720**

**FY 2027-28 Budget: \$25,462**

**FY 2028-29 Budget: \$26,226**

**FY 2029-30 Budget: \$27,013**

*SaaS arrangement includes all licensing fees and hosting costs, including (but not limited to): (1) maintaining secure and redundant hosting environments, (2) monitoring system performance, security, and redundancy, (3) providing unlimited technical support and account maintenance, (4) communicating with administrators and end-users on an ongoing basis to ensure that the system continues to meet local needs, and (5) making minor client-specific customizations (in addition to implementing general system enhancements excluding generational platform changes).*



## Appendix B – Budget

**CollabriOS  
SF GetCare  
July 1, 2026 – June 30, 2030**

The table below summarizes the total cost by component for the following fiscal years:

Line Item	FY 26-27	FY 27-28	FY 28-29	FY 29-30	Total
Line 1: Development & Customization	\$50,000	\$50,000	\$50,000	\$50,000	\$200,000
Line 2: CA GetCare System	\$438,025	\$451,166	\$464,701	\$478,642	\$1,832,534
Line 3: Data Export Maintenance	\$24,720	\$25,462	\$26,226	\$27,013	\$103,421
<b>Total</b>	<b>\$512,745</b>	<b>\$526,628</b>	<b>\$540,927</b>	<b>\$555,655</b>	<b>\$2,135,955</b>
Contingency					\$213,596
NTE					\$2,349,551

**Budget:**

The 4-year budget under this agreement is \$2,135,955, plus a 10% contingency for a total amount not to exceed \$2,349,551



# SAN FRANCISCO HUMAN SERVICES AGENCY

P.O. Box 7988  
San Francisco, CA  
94120-7988  
[www.SFHSA.org](http://www.SFHSA.org)

Date: April 27, 2026  
To: Dan Kaplan, Deputy Director, HSA  
From: Patrick Garcia, Senior Contract Manager  
RE: Sole Source Waiver request – CollabriOS to provide access to CA GetCare

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Department of Benefits  
and Family Support

Department of Disability  
and Aging Services

The Human Services Agency (HSA) requests approval for the sole source waiver for CollabriOS (formerly RTZ) for the provision of CA GetCare for the period of July 1, 2026 to June 30, 2030 for a total amount Not-To-Exceed \$2,349,551.

## Background

DAS needs a dedicated database system as a means for tracking and reporting of program performance at its Benefits and Resource Hub as well as its approximately 250 contracts for community based services provided by over 60 community-based organizations. The data collected through this system meets many purposes: tracking and measuring performance levels, analysis of demographic and enrollment data to understand need and participation rates, compliance with fiscal, budget, and contracting reporting requirements tied to multiple funding sources.

The data collection needs to meet all these requirements are complex. It includes the storage and management of hundreds of thousands of client and enrollment records and millions of service unit records each year. Significant flexibility and customization is needed as the scope and type of data to be collected and managed can vary by service type and funding source.

DAS has had a business relationship with CollabriOS (formerly RTZ) since 1999 for database services in varying forms. For the past 10 years or so, the “CA GetCare” and “IR2” databases have been the primary CollabriOS database systems utilized by DAS. CA GetCare is primarily used by Office of Community Partnerships staff and community based contractors, while the “IR2” database system has been primarily used by DAS Benefits and Resource Hub staff.

## Services to be Provided

CollabriOS will provide access to its proprietary software system allowing for tracking, coordinating, management, and reporting of program services for DAS programs and DAS funded community based services.

In addition, CollabriOS will provide ongoing support including additional customization, technical support, data integration, data analysis, reporting function, updates, and training resources for the CollabriOS database systems and services included in this contract.



**Daniel Lurie**  
Mayor

**Trent Rhorer**  
Executive Director, SFHSA

**Kelly Dearman**  
Executive Director, DAS



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**Sole Source Justification**

The product is a proprietary system developed, operated, and maintained exclusively by CollabriOS. Therefore, CollabriOS is the only provider for this product.

Brief description of services: CollabriOS will provide access to its proprietary software system allowing for tracking, coordinating, management, and reporting of program services for DAS programs and DAS funded community based services
Contract NTE: \$2,349,551
Contract Term: July 1, 2026 to June 30, 2030
Funding Source: County General Funds
Admin Code: Admin Code 21.30: Proprietary Software Licenses and Support and Proprietary Equipment

Approved       Disapproved

DocuSigned by:  
*Daniel Kaplan*

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Dan Kaplan, Deputy Director of Administration and Finance

