



Mark Farrell, Mayor

Department of Human Services  
 Department of Aging and Adult Services  
 Office of Early Care and Education

Trent Rhorer, Executive Director

**MEMORANDUM**

**TO:** AGING & ADULT SERVICES COMMISSION

**THROUGH:** SHIREEN McSPADDEN, EXECUTIVE DIRECTOR

**FROM:** CINDY KAUFFMAN, DEPUTY DIRECTOR  
 JOHN TSUTAKAWA, DIRECTOR OF CONTRACTS *JAT*

**DATE:** JUNE 6, 2018

**SUBJECT:** NEW CONTRACT: RTZ ASSOCIATES, INC. (FOR PROFIT)  
 TO PROVIDE ACCESS, DEVELOPMENT, SUPPORT,  
 MAINTENANCE, AND TRAINING OF SF-GETCARE

**CONTRACT TERM:** 7/1/2018-6/30/2020

**CONTRACT AMOUNT:**

	<u>New</u>	<u>Contingency</u>			
	\$2,192,312	\$219,231	<u>Total</u>		
	\$2,411,543				

**ANNUAL AMOUNT**

	<u>FY 18/19</u>	<u>FY 19/20</u>			
	\$1,090,272	\$1,102,040			

**Funding Source**

	<u>County</u>	<u>State</u>	<u>Federal</u>	<u>Contingency</u>	<u>Total</u>
	\$2,192,312			\$219,231	\$2,411,543

**PERCENTAGE:** 100% 100%

The Department of Aging and Adult Services (DAAS) requests authorization to enter into a new contract with RTZ Associates, Inc. (RTZ) for the period beginning July 1, 2018 and ending June 30, 2020, in an amount of \$2,192,312 plus a 10% contingency for a total amount not to exceed \$2,411,543. The purpose of the contract is to provide access, development, support, maintenance, and training of the SF-GetCare system.

**Background**

In 1999, RTZ began working with the San Francisco Department of Aging and Adult Services (DAAS) to develop an information system to track services for older adults in San Francisco. In October 2003, as part of its commitment to streamline discharge planning and increase access to community-based services, the San Francisco Department of Public Health (DPH) contracted with RTZ to further develop an application to support Laguna Honda Hospital discharge processes. A number of additional applications and functions have since been added to

the core system, known as SF-GetCare, which has evolved into a comprehensive information system that coordinates, tracks and manages adult services across San Francisco county programs.

Since 2003, DPH has directly managed RTZ's SF-GetCare contract on their and DAAS's behalf. DPH's share of the contract has historically been over 50% of the overall contract. During this time, any portion of the contract that was attributed to DAAS, was paid through a work order of funds to DPH. However, within the next 18 to 24 months, DPH is expected to discontinue their portion of the contract as DPH is in the process of developing a new system to manage services historically provided to them through the SF-GetCare system. Starting July 1, 2018, DAAS is taking over the management of the SF-GetCare contract to continue services through this transition, with the intention of renewing thereafter as the sole administering agency.

### **Services to be Provided**

RTZ will provide access to its proprietary information system allowing for tracking, coordinating, management, and reporting of adult services across San Francisco county programs. Additionally, over the contract term, RTZ will provide development, technical support, data integration, data analysis, reporting, updates, and staff training of the SF-GetCare System. For a detailed breakdown of service components, please see Appendix A & A1: Scope of Service.

### **Selection**

Contractor is a sole source provider. RTZ owns the SF-GetCare intellectual property and is the exclusive distributor for the product and product support. No other vendor may use, modify or license SF-GetCare. Based on the proprietary nature of the product and extensive previous development history of the SF-GetCare system for the City, RTZ was determined to be the only qualified vendor.

### **Funding**

Funding for these services will be provided through County General Funds. During the fiscal years 2018-2020, DPH is anticipated to work order \$1,231,912 in funds to the HSA to cover DPH expenditures associated with this grant, and the HSA will cover the remaining \$960,400 in funds to cover its own expenditures associated with this grant.

### **ATTACHMENTS**

Appendix A  
Appendix B  
Appendix A1  
Appendix B1

## Appendix A

### Scope of Services (FY 2018-19 and FY 2019-20)

RTZ Associates, Inc. for San Francisco Department of Aging and Adult Services (DAAS)

**Background:** In 1999 RTZ Associates began working with the San Francisco Department of Aging and Adult Services (DAAS) to develop an information system to track services for older adults in San Francisco. In October 2003, as part of its commitment to streamline discharge planning and increase access to community-based services, the San Francisco Department of Public Health (DPH) contracted with RTZ Associates, Inc. (RTZ) to build on that web-based system to develop an application to support Laguna Honda Hospital discharge planning. A number of additional application and functions have since been added to the core system, known as SF-GetCare, which has evolved into a comprehensive information system that coordinates, tracks and manages adult services across San Francisco county programs. This document describes the components of the system funded by DAAS and the costs of each for fiscal years 2018-19 and 2019-20.

#### 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
ASP	Application Service Provider: a business providing computer-based services to customers over a network
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 to get meals from a dietitian-approved menu at specified area restaurants
CLF	Community Living Fund: a program to connect individuals to needed medical and psychosocial services that will support independent living
CMIPSI	Case Management, Information, and Payrolling System (Version 2): a statewide database and central processing for IHSS payrolling, case management and reporting
CTP	Care Transitions Program: a hospital-to-home service that bridges the gap between a hospital discharge and recovery
DAAS	San Francisco Department of Aging and Adult Services

DCIP	Diversion and Community Integration Program: a program that existed between 2008 and 2013 to assist individuals referred to or discharged from Laguna Honda Hospital to access the most integrated setting appropriate to their needs and preferences
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
IHIS	Integrated Housing Information System: A database of client housed in scattered site housing units
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
NAPIS	National Aging Program Information 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
RTZ	RTZ Associates, Inc. / RTZ Systems: this vendor

### Item 1: Integrated Housing Information System

**Item 1: Integrated Housing Information System (IHIS)** – This tool provides a database of clients housed in units managed by the DAAS scattered site housing vendor. For the referrals to the scattered site system from the Community Living Fund (CLF), this tool pulls all the referral information directly from the (CLF) database, allowing CLF users to make a referral with a simple push of a button to upload information into the IHIS. The tool includes a database of clients and a database of housing units, as well as a tracking system for managing move-in and move-out information, and a number of operational reports. Management tools allow DAAS to oversee housing and client information in real time.

DCIP data is housed in the back end of the IHIS and is available in an expanded report, as well as ad hoc reports as requested.

**Charge Items:** Ongoing application service provider (ASP) costs  
Ongoing technical support  
Ongoing import, filtering, and integration of CLF information

**FY 2018-19 \$4,600 per month (\$55,200 per year)**

**FY 2019-20 \$4,738 per month (\$56,856 per year)**

## **Item 2: CAGetCare/IR2 Information System**

**Item 2a: CAGetCare service management component** – This component supports multiple operational areas: managing client data, including all NAPIS-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 DAAS-funded community-based case managers; medication management; HDM waiting list clearinghouse, 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.

**Charge Items:**

- Ongoing application service provider (ASP) costs
- Ongoing compliance with NAPIS reporting requirements
- Ongoing integration (file transfers) with the statewide CARS system
- Ongoing technical support
- Periodic training for end-users, as needed

**FY 2018-19 \$12,375 per month (\$148,500 per year)**

**FY 2019-20 \$12,750 per month (\$153,000 per year)**

**Item 2b: Integrated Intake Service Management** – This tool includes I&R/A, integrated intake, Waiting List tool and a care transitions case management tool. 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 CLF, Home-Delivered Meals, IHSS, Care Transitions and Case Management are made from the module directly to the programs. CLF referrals populate the CLF CaseCare tool with specified data from the intake.

Community providers, such as hospital discharge planners, case managers, home health providers, Laguna Honda social workers, and home-delivered meal providers can complete an online referral on a secure cloud-based portal for submission to the DAAS Intake Team. The Intake Team reviews the online referral and can return it to the submitter for more information or move the referral forward – which includes actions from withdrawing the referral to placing it on a waiting list to seeing the referral through to enrollment. Because this module is part of the integrated GetCare database, staff can view service enrollments and the system automatically updates records using CMIPSII data.

The Care Transitions component includes assessments; service plans; progress notes; purchase of service requests, and the authorization, verification and reconciliation of purchases. Automatic e-mail notifications facilitate communication between intake staff, supervisors, and Transition Specialists. This system includes a separate Readmission Tool component that allows hospital staff to track CTP clients who have

been readmitted to the acute setting.

**Charge Items:** Ongoing application service provider (ASP) costs  
Ongoing technical support  
Periodic data analysis, as requested  
Periodic training for end-users, as needed

**FY 2018-19 \$11,845 per month (\$142,140 per year)**

**FY 2019-20 \$12,200 per month (\$146,400 per year)**

**Item 2c: Development and customization** – These funds will be used to support new projects and changes to the existing CAGetCare Service Management and Integrated Intake databases, as they are requested and sanctioned by DAAS.

**FY 2018-19 \$128,480 per year (Reserve to be used in consultation with DAAS)**

**FY 2019-20 \$129,824 per year (Reserve to be used in consultation with DAAS)**

*ASP arrangement includes all licensing fees and hosting costs, including (but not limited to): (1) maintaining a secure collocation facility, (2) purchasing and upgrading all hosting software and hardware (including redundant application and database servers for production and development environments, as well as intermediary load-balancing hardware), (3) monitoring system performance and security, (4) backing-up data to a secure, secondary collocation facility on a nightly basis, (5) providing unlimited technical support and account maintenance, (6) communicating with administrators and end-users on an ongoing basis to ensure that the system continues to meet local needs, and (7) making minor client-specific customizations (in addition to implementing general system enhancements).*

## Appendix B Budget (FY 2018-19 and FY 2019-20)

RTZ Associates, Inc. for San Francisco Department of Aging and Adult Services (DAAS)

The table below summarizes the total cost by component for fiscal years 2018-19 and 2019-20 .  
The last column presents the total two-year budget for fiscal years 2018-20.

	FY 2018-19	FY 2019-20	Total costs for FY 2018-20
Item 1: Integrated Housing Information System (DAAS)	55,200	56,856	112,056
Item 2a CA-GetCare Information System (DAAS)	148,500	153,000	301,500
Item 2b: Integrated Intake Service Management (DAAS)	142,140	146,400	288,540
Item 2c: Development and Customization Reserve	128,480	129,824	258,304
<b>Total</b>	<b>474,320</b>	<b>486,080</b>	<b>\$ 960,400</b>

## Appendix A1

### Scope of Services (FY 2018-19 and FY 2019-20)

RTZ Associates, Inc. for San Francisco Department of Public Health (DPH)

**Background:** In 1999 RTZ Associates began working with the San Francisco Department of Aging and Adult Services (DAAS) to develop an information system to track services for older adults in San Francisco. In October 2003, as part of its commitment to streamline discharge planning and increase access to community-based services, the San Francisco Department of Public Health (DPH) contracted with RTZ Associates, Inc. (RTZ) to build on that web-based system to develop an application to support Laguna Honda Hospital discharge planning. A number of additional application and functions have since been added to the core system, known as SF-GetCare, which has evolved into a comprehensive information system that coordinates, tracks and manages adult services across San Francisco county programs. This document describes the components of the system funded by DPH and the costs of each for fiscal years 2018-19 and 2019-20.

#### Definitions:

ASP	Application Service Provider: a business providing computer-based services to customers over a network
DAAS	San Francisco Department of Aging and Adult Services
DPH	San Francisco Department of Public Health
EHR	Electronic Health Record: a digital version of a patient's paper medical chart
Epic	Epic Systems Corporation: San Francisco Department of Public Health is working with this company to create a department-wide electronic health record
IMD	Institution for Mental Diseases: a hospital, nursing facility, or other institution of more than 16 beds that is primarily engaged in providing diagnosis, treatment, or care of persons with mental diseases
Invision system	Software product developed by Siemens and used by Laguna Honda Hospital and Rehabilitation Center for tracking patient information
JCC	Joint Conference Committee of the San Francisco Health Commission
LCR	Lifetime Clinical Record: a software system used by LHH for tracking patient information
LHH	Laguna Honda Hospital and Rehabilitation Center



RCF/E	Residential Care Facility/Residential Care Facility for the Elderly
RCFEs	Residential Care Facilities for the Elderly
RTZ	RTZ Associates, Inc. / RTZ Systems: this vendor
SNF	Skilled Nursing Facility
ZSFG	Zuckerberg San Francisco General Hospital

### Item 1: SFGetCare Information System

**Item 1a: DPH Transitions component** – This interactive housing placement system includes an online interactive directory of DPH-funded beds (with detailed information on the availability, cost, and requirements of each unit); a client database; an interface to match clients with appropriate housing units; and a holding pool system. The system produces powerful management reports on bed utilization/availability as well as the production of billing invoices. Multiple residence types are included, such as IMD, RCF/E, and SNF. In fiscal year 2018-19, a public facing referral and referral management function will be added to the component for RCF and RCFEs.

In addition to the operational component, this item includes project management to assist in the conversion of the Transitions Team to the larger DPH electronic health record.

<b>Charge Items:</b>	Ongoing application service provider (ASP) costs Ongoing technical support Ongoing assistance in managing/updating housing list Periodic updates to accommodate revised billing and reporting standards Periodic data analysis, as requested Periodic training for end-users, as needed Project management to support transition to Epic EHR
	<b>FY 2018-19 \$14,372 per month</b> (\$172,464 per year)
	<b>FY 2019-20 \$13,206 per month</b> (\$158,472 per year)

**Item 1b: ZSFG placement component** – This tool securely imports client-level data from the LCR/Invision system and supports the identification and disposition of discharge-ready patients. RTZ uses these data to provide analytic reports on non-acute/admin days for senior DPH staff. Transitions Team staff document progress notes in this tool and ZSFG Social Worker progress notes are imported into this tool from the LCR.

<b>Charge Items:</b>	Ongoing application service provider (ASP) costs Ongoing technical support Periodic revisions to data importation scripts, as needed Periodic data analysis, as requested
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Periodic training for end-users, as needed  
 Monthly Utilization Review reports  
 Project management to support transition to Epic EHR

**FY 2018-19 \$2,678 per month (\$32,136 per year)**

**FY 2019-20 \$2,678 per month (\$32,136 per year)**

## Item 2: Laguna Honda (LHH) Information System

**Item 2a: Laguna Honda Hospital Information System** – This tool includes the original information system developed for Social Services discharge planning, which was later expanded to include Nursing, Clinical Nutrition, Activity Therapy, and Vocational Rehabilitation. Core functionality includes (but is not limited to): a client tracking system that records clinical information; integrated progress notes with multiple flags and templates, specific for each discipline; a powerful progress notes management tool; specialized assessments for each discipline; care planning; e-alerts, and a reporting system that provides client and operational outcomes.

**Charge Items:** Ongoing application service provider (ASP) costs  
 Ongoing technical support  
 Weekly import and cleaning of LHH admission and discharge medical record data  
 Monthly creation of LHH reports  
 Monthly reports for Joint Conference Committee (JCC) meetings  
 Periodic data analysis, as requested  
 Periodic training for end-users, as needed  
 Project management to support transition to Epic EHR

**FY 2018-19 \$19,086 per month (\$229,032 per year)**

**FY 2019-20 \$19,086 per month (\$229,032 per year)**

**Item 2b: LHH Rehab Database** – This tool is a comprehensive database for the LHH Rehabilitation Department. It allows each therapy type to enter documentation, track hours of service, and create billing documentation directly from the documentation. Other features include (but are not limited to): assessment, scheduling, tracking and reporting. Dashboards assist with tracking productivity.

**Charge Items:** Ongoing application service provider (ASP) costs  
 Ongoing technical support  
 Periodic data analysis, as requested  
 Periodic training for end-users, as needed  
 Project management to support transition to Epic EHR

**FY 2018-19 \$12,360 per month (\$148,320 per year)**

**FY 2019-20 \$12,360 per month (\$148,320 per year)**

## Item 3: HopeSF Information System

**Item 3: HopeSF Information System** – This system is currently being developed to meet the daily

operational needs of public health nurses in four housing sites to provide outreach, link individuals to medical care and wraparound social services, and create a focused plan for complex care management. Included are the ability to: track, assess, create care plans, make referrals and draft progress notes for up to 200 housing residents in four buildings, and outcome data reporting. The development version of the site was launched in early 2018. The monthly ASP fees for the system through December 2018 were included as part of startup funding paid in FY 2017-18. The monthly ASP fee of \$4000 starts in January 2019. Typically a new service program will evolve and change after launch. FY 2018-19 includes a reserve of \$10,000 to fund system changes requested by staff to better meet changing program needs.

**Charge Items:** Ongoing application service provider (ASP) costs  
 Ongoing technical support  
 Periodic training for end-users, as needed  
 Project management to support transition to Epic EHR

**FY 2018-19 \$4,000 per month** for 6 months (\$24,000)  
 + one-time reserve (\$10,000) = \$34,000 total for fiscal year  
**FY 2019-20 \$4,000 per month** (\$48,000 per year)

*ASP arrangement includes all licensing fees and hosting costs, including (but not limited to): (1) maintaining a secure collocation facility, (2) purchasing and upgrading all hosting software and hardware (including redundant application and database servers for production and development environments, as well as intermediary load-balancing hardware), (3) monitoring system performance and security, (4) backing-up data to a secure, secondary collocation facility on a nightly basis, (5) providing unlimited technical support and account maintenance, (6) communicating with administrators and end-users on an ongoing basis to ensure that the system continues to meet local needs, and (7) making minor client-specific customizations (in addition to implementing general system enhancements).*

## Appendix B1 Budget (FY 2018-19 and FY 2019-20)

RTZ Associates, Inc. for San Francisco Department of Public Health (DPH)

The table below summarizes the total cost by component for fiscal years 2018-19 and 2019-20. The last column presents the total two-year budget for fiscal years 2018-20.

	FY 2018-19	FY 2019-20	Total costs for FY 2018-20
Item 1a: DPH Transitions component	172,464	158,472	330,936
Item 1b: ZSFG placement component	32,136	32,136	64,272
Item 2a: Laguna Honda Hospital information system	229,032	229,032	458,064
Item 2b: LHH Rehab Database	148,320	148,320	296,640
Item 3: HopeSF Information System	34,000	48,000	82,000
<b>Totals</b>	<b>615,952</b>	<b>615,960</b>	<b>1,231,912</b>