

**SUMMARY OF CONTRACT REQUEST TO THE HEALTH COMMISSION**

Contractor	<u>Apex Revenue Technologies</u>	Division/Section	<u>SFDPH, Finance</u>
Address	<u>100 S Owasso Blvd W</u>	Deputy Director	<u>Greg Wagner</u> <i>Greg Wagner</i>
	<u>Saint Paul, MN 55117</u>	DPH Administrator	<u>Diana Guevara</u>
Contact	<u>Matthew Crawley</u>	Program Administrator	<u>Tim Arnold</u> Phone <u>415-759-3351</u>
	<u>Regional Director, Business Development</u>	Contract Analyst	<u>Joanna Li</u> Phone <u>415-554-2818</u>

**Request for approval of a new contract with Apex Revenue Technologies, to provide services needed in order to convert billing data from the new Electronic Health Record system into a patient billing statement for patients of the San Francisco Health Network (SFHN) in the amount of \$8,540,000 which includes a 12% contingency and an option to extend the contract for an additional 24 months. The term of the contract including options is for the period April 1, 2018 to February 28, 2023 (60 months).**

Profit   
  Non-Profit   
  LBE   
  RFP- Number: 37 - 2017   
 Date: 10/31/2017  
 New   
  Renewal   
  Mod   
  GPO

Number of years DPH has been doing business with this organization: 0

<u>CONTRACT INFORMATION:</u>	<u>Prior Transaction</u> (new)	<u>Proposed Transaction</u> 04/01/18 - 02/28/23	<u>Annualized Difference*</u>
<b>Funding Sources:</b>			
General Fund		\$7,625,000	\$7,625,000
<b>TOTAL DPH REVENUES</b>		\$7,625,000	\$7,625,000
12% Contingency Amount		\$915,000	\$915,000
<b>CONTRACT TOTAL</b>		\$8,540,000	\$8,540,000
<i>ANNUAL AMOUNT OF CONTRACT (estimate)</i>		\$1,525,000	\$1,525,000
Agency Funds		-\$0-	-\$0-
Contract FTE		N/A	N/A

**PROPOSED:**

<b>Mode(s) of Service &amp; Unit of Service Definition</b>	<b>No. Of Clients</b>		<b>No. of Units</b> (Estimated)	<b>Unit Cost</b> (Per Item)
	<u>N/A</u>	Duplicated		
1 UOS = 1 Statement or Letter produced, or unit of postage	<u>N/A</u>	Unduplicated		
<b>Fee For Service based</b>				
<i>All Rates include: Customized Templates, Secure FTP transmission including annual FTP certification fees, handling and inserting fees, unlimited data transmission fees, ink, paper, and folding fees.</i>				
<b>Deliverable 1: Full Color Statements</b>				
20# Plain Bond Paper and #9 Window Envelope Included	N/A		7,500,000	.11
<b>Deliverable 2: Full Color Letters</b>				
20# Plain Bond Paper and #9 Window Envelope Included	N/A		7,500,000	.11
<b>Deliverable 3: Postage Fee</b>				
USPS First Class	N/A		7,500,000	.43

**Explanation of Service Change and Variances:**

This is a new contract.

**Monitoring Report/Program Review & Follow-up:**

The contract services will be monitored by the Department as required. The SFDPH Program Administrator will be responsible for assisting and tracking all information related to the accomplishment of the project.

**Nondiscrimination and Cultural Competency:**

The Department will work closely with the contractor to ensure that their cultural competency plan is current and in compliance with Departmental procedures.

**Other Significant Issues:**

Apex Revenue Technologies (Apex) has been in business since 1995 and provides solutions to more than 2,500 healthcare organizations across the United States. Apex offers a single platform solution, providing a variety of patient communications and payment technologies that enable patients to make convenient payments. Apex has a deep technical experience normalizing patient data and providing seamless portal experience with Epic and the City and County of San Francisco governing environment.

Apex Revenue Technologies was the successful respondent to RFP 37-2017 for patient statement mailers, insurance and patient letters.

**Listing of Board of Directors, Owners of 10% or More of the Firm, and Executive Director**

Brian Kueppers, CEO

**Board of Directors:**

- John Turner, Chairman and Board Member
- Brian Kueppers, CEO
- Pat Maurer, Board Member
- Matt Carrol, Board Member
- Brian Provost, Board Member

There are no owners with 10% or more interest in the firm.

Westview Capital, 77% Owner of firm

There are 5 board members. There are no vacancies at the present time, and there is a 4 term limit for members.

**Recommendations:**

The Department recommends approval of this contract.