

File No. 260713

Committee Item No. 15

Board Item No. _____

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Budget and Finance Committee Date July 22, 2026

Board of Supervisors Meeting Date _____

Cmte Board

- | | | |
|-------------------------------------|--------------------------|--|
| ☐ | ☐ | Motion |
| ☒ | ☐ | Resolution |
| ☐ | ☐ | Ordinance |
| ☐ | ☐ | Legislative Digest |
| ☐ | ☐ | Budget and Legislative Analyst Report |
| ☐ | ☐ | Youth Commission Report |
| ☐ | ☐ | Introduction Form |
| ☒ | ☐ | Department/Agency Cover Letter and/or Report |
| • DPH Memo 5/20/2026 | | |
| • MYR Memo 6/16/2026 | | |
| ☐ | ☐ | MOU |
| ☒ | ☐ | Gift Information Form |
| ☒ | ☐ | Grant Budget |
| ☐ | ☐ | Subcontract Budget |
| ☐ | ☐ | Contract/Agreement |
| ☐ | ☐ | Form 126 – Ethics Commission |
| ☒ | ☐ | Gift Acknowledgement |
| ☐ | ☐ | Application |
| ☐ | ☐ | Public Correspondence |

OTHER (Use back side if additional space is needed)

- | | | |
|-------------------------------------|--------------------------|---|
| ☒ | ☐ | <u>Behested Payment Form and Certification 11/18/2025</u> |
| ☒ | ☐ | <u>Gift Questionnaire 11/18/2025</u> |
| ☒ | ☐ | <u>EPIC Donor Response 5/12/2026</u> |
| ☒ | ☐ | <u>Health Commission Resolution No. 26-02 2/2/2026</u> |
| ☒ | ☐ | <u>DPH Statement on Retroactivity 7/16/2026</u> |
| ☒ | ☐ | <u>DPH Presentation 7/22/2026</u> |
| ☐ | ☐ | _____ |
| ☐ | ☐ | _____ |
| ☐ | ☐ | _____ |
| ☐ | ☐ | _____ |

Completed by: Brent Jalipa Date July 15, 2026

Completed by: Brent Jalipa Date _____

1 [Accept and Expend Gift - Retroactive - Epic Systems Corporation - 2025 UGM Safety Net
2 Grant - \$12,710.44]

3 **Resolution retroactively authorizing the Department of Public Health to accept and**
4 **expend a monetary gift, entitled “2025 UGM Safety Net Grant,” in the amount of**
5 **\$12,710.44 from the Epic Systems Corporation to help low income and at-risk**
6 **populations for the period of July 1, 2025, through June 30, 2026.**

7
8 WHEREAS, The Epic Systems Corporation (ESC) has donated the “2025 UGM Safety
9 Net Grant” to the San Francisco Department of Public Health (DPH) in the amount of
10 \$12,710.44 for the department’s role as a safety net provider; and

11 WHEREAS, DPH Safety Net is comprised of DPH hospitals, DPH clinics, DPH civil
12 service providers, Emergency Medical Service Treatment providers, Department of Aging and
13 Adult Services Case Management programs, and DPH affiliate and contract treatment
14 providers; and

15 WHEREAS, The ESC provides gifts to entities that help low income and at-risk
16 populations; now, therefore, be it

17 RESOLVED, That the Board of Supervisors approves the gift and authorizes DPH to
18 accept and expend a gift of cash in the value of \$12,710.44 donated by the ESC; and, be it

19 FURTHER RESOLVED, That the proceeds of the gift by the ESC will be accepted and
20 expended consistent with the San Francisco Administrative Code Sections governing the
21 acceptance of gifts to the City and County of San Francisco, including the San Francisco
22 Administrative Code, Section 10.100-305; and, be it

23 FURTHER RESOLVED, That the Board of Supervisors extends its gratitude to the
24 ESC for the generous gift to the City and County of San Francisco in support of DPH.
25

1 Recommended: Approved: /s/ Sophia Kittler for
2 Mayor Daniel Lurie
3 /s/ Jenny Louie for
4 Daniel Tsai Approved: /s/ Jocelyn Quintos for
5 Director of Health Greg Wagner, Controller
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File Number: 260713
(Provided by Clerk of Board of Supervisors)

Gift Resolution Information Form
(Effective July 2011)

Purpose: Accompanies proposed Board of Supervisors resolutions authorizing a Department to accept and expend gift funds.

The following describes the gift referred to in the accompanying resolution:

1. Gift Title: **2025 UGM Safety Net Grant**

2. Department: **Department of Public Health**

3. Contact Person: **Natasha Lalani** Telephone: **628-206-1142**

4. Gift Approval Status (check one):

☒ Approved by funding agency

☐ Not yet approved

5. Amount of Gift Funding Approved or Applied for: **\$12,710.44**

6a. Matching Funds Required: **\$0**

b. Source(s) of matching funds (if applicable): **N/A**

7a. Gift Source Agency: **Epic Systems Corporation**

b. Gift Pass-Through Agency (if applicable): **N/A**

8. Proposed Gift Project Summary: **Epic Systems provides gifts to entities that serve the underserved as we do in the Safety Net. We will be receiving the gift honoring our support, and our role as a safety net provider.**

9. Gift Project Schedule, as allowed in approval documents, or as proposed:

Start-Date: **07/01/2025**

End-Date: **06/30/2026**

10a. Amount budgeted for contractual services: **\$0**

b. Will contractual services be put out to bid? **N/A**

c. If so, will contract services help to further the goals of the Department's Local Business Enterprise (LBE) requirements? **N/A**

d. Is this likely to be a one-time or ongoing request for contracting out? **N/A**

11a. Does the budget include indirect costs? ☐ Yes ☒ No

b1. If yes, how much? \$ **N/A**

b2. How was the amount calculated? **N/A**

c1. If no, why are indirect costs not included?

☐ Not allowed by Gifting agency

☒ To maximize use of gift funds on direct services

☐ Other (please explain):

c2. If no indirect costs are included, what would have been the indirect costs? **5% of Direct Costs**

12. Any other significant gift requirements or comments:

The gift does not require an ASO amendment and does not create net new positions.

We respectfully request for approval to accept and expend these funds retroactive to July 1, 2025. The Department received the award on December 1, 2025.

Fund ID:	14820
Department ID:	162643
Project Desc:	Epic UGM/XGM
Project ID:	10043626
Authority ID:	10001
Activity ID:	0001

****Disability Access Checklist** (Department must forward a copy of all completed Gift Information Forms to the Mayor's Office of Disability)**

13. This Gift is intended for activities at (check all that apply):

- | | | |
|--|---|--|
| ☒ Existing Site(s) | ☐ Existing Structure(s) | ☐ Existing Program(s) or Service(s) |
| ☐ Rehabilitated Site(s) | ☐ Rehabilitated Structure(s) | ☐ New Program(s) or Service(s) |
| ☐ New Site(s) | ☐ New Structure(s) | |

14. The Departmental ADA Coordinator or the Mayor's Office on Disability have reviewed the proposal and concluded that the project as proposed will be in compliance with the Americans with Disabilities Act and all other Federal, State and local disability rights laws and regulations and will allow the full inclusion of persons with disabilities. These requirements include, but are not limited to:

1. Having staff trained in how to provide reasonable modifications in policies, practices and procedures;
2. Having auxiliary aids and services available in a timely manner in order to ensure communication access;
3. Ensuring that any service areas and related facilities open to the public are architecturally accessible and have been inspected and approved by the DPW Access Compliance Officer or the Mayor's Office on Disability Compliance Officers.

If such access would be technically infeasible, this is described in the comments section below:

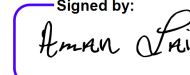
Comments:

Departmental ADA Coordinator or Mayor's Office of Disability Reviewer:

Toni Rucker, PhD
(Name)

DPH ADA Coordinator
(Title)

Date Reviewed: 5/14/2026 | 2:22 PM PDT

Signed by:

9A0005B7003243C...
(Signature Required)

Aman Lail, CAO, Ambulatory Services Division for Toni Rucker, PhD

Department Head or Designee Approval of Gift Information Form:

Daniel Tsai
(Name)

Director of Health
(Title)

Date Reviewed: 5/27/2026 | 10:32 AM PDT

Signed by:

40CFE25DD0B41404...
(Signature Required)



**Files 260713, 260714, 260735
Gift Accept and Expend**

**Epic Systems Corporation Gifts:
2025 UGM Safety Net
2025 Safety Net**

Unrestricted: Help Low-Income and At-Risk Populations

**BOS Budget & Finance Committee
July 22, 2026**

Natasha Lalani, Electronic Health Record Program Director

SAN FRANCISCO DEPARTMENT OF PUBLIC HEALTH

File 260713: Overview of Gift: 2025 UGM Safety Net



- **Amount:** \$12,710.44
- **Timeline:** July 1, 2025, through June 30, 2026
- **Funder:** Epic Systems Corporation
- **Gift Summary:**
 - Epic is an electronic medical record software program. SFDPH uses Epic for our healthcare services throughout DPH services.
 - Epic provides gifts to all Federally Qualified Health Systems (FQHCs) using Epic, including this gift for SFDPH. SFDPH is a Safety Net provider.
 - Gift will support User Group Meeting (conference) travel attendance

File 260714 Overview of Gift: 2025 Safety Net Gift



- **Amount:** \$115,000
- **Timeline:** July 1, 2025, through June 30, 2026
- **Funder:** Epic Systems Corporation
- **Gift Summary:**
 - Epic considers DPH to be a Safety Net Provider based on the volume of Medicaid (Medi-Cal) patients served
 - Epic provides gifts to numerous Safety Net entities that help low income and at-risk populations, including this gift for SFDPH
 - This gift will support Epic staff training at SFDPH and the purchase of materials and supplies

File 260735: Overview of Gift: 2025 Unrestricted Gift



- **Amount:** \$37,500
- **Timeline:** July 1, 2025, through June 30, 2026
- **Funder:** Epic Systems Corporation
- **Gift Summary:**
 - Epic considers DPH to be a Safety Net Provider based on the volume of Medicaid (Medi-Cal) patients served
 - Epic provides gifts to numerous Safety Net entities that help low income and at-risk populations, including this gift for SFDPH
 - This gift will support Epic staff training at SFDPH and the purchase of materials and supplies

Retroactivity



We are seeking **retroactive authorization** to accept these gifts.

- SFDPH received notice of the 2025 UGM Safety Net Grant on December 1, 2025, the 2025 Safety Net gift on January 21, 2026, and the 2025 Unrestricted gift on December 9, 2025.
- DPH brought these items to the BOS on June 16, 2026, and June 23, 2026, after a budget development process and a thorough review process with the Controller's Office. The items were sent to the Controller's Office in April and received approval from the Mayor's Budget Office in June.
 - All Epic gifts comply with the behest legislation exemptions.



Conclusion

**DPH respectfully requests retroactive approval of these items.
Thank you!**

Epic

Epic Systems Corporation
One-Year Budget
Project ID: 10043626
July 1, 2025 – June 30, 2026
2025 UGM Safety Net Gift

DIRECT COSTS	Fiscal Year 26	Totals
Travel Costs	12,710.44	12,710.44
TOTAL	\$12,710.44	\$12,710.44

Submission Confirmation Receipt
Report Date & Time:12/01/2025 01:32 PM PST
Capture Type:Check(s) Only

This Submission Confirmation receipt represents items submitted for transfer and is not a deposit confirmation. Please
verify individual transaction status from Capture History

Receivables ID	Group	Batch Number	Captured By	Captured Date & Time	Payer Routing Number	Payer DDA	Payment / Serial Number	Amount	Reference Text
2190638 - RDC - DPH - 1483D1 HEALTH OFFICES DEPOSITORY		1204120125	Sharon Lau	12/01/2025 01:32 PM PST	071000288	XXXXXX4087	0370092	USD 12,710.44	

Total Number of Checks	1
Total Amount	USD 12,710.44

Epic Epic Systems Corporation
1979 Milky Way
Verona, WI 53593

BMO HARRIS BANK N.A.
Chicago, IL
USA

2-28
710

370092

November 18 2025

\$ 12,710.44***

PAY TO THE
ORDER OF

*** Twelve Thousand Seven Hundred Ten and 44/100

US Dollars

VOID AFTER 180 DAYS

San Francisco Dept. of Public Health

Attn: Eric Raffin
1001 Potrero Ave
Bldg 40 - 4th Floor
Room 405
San Francisco, CA 94110



Eric Raffin



Check 370092

Vendor : V00101147, San Francisco Dept. of Public Health

Invoice number	Description	Invoice date	Payment amount
11.3.25SFDPH	2025 UGM Safety Net Grant	11/3/2025	12,710.44
Total	<u>The note that's too long to print on the check:</u> You may have obligations to report this contribution to Medicare, Medicaid and other government and private payors.		12,710.44

RECEIVED
CASHIER
2025 DEC -1 PM 2:29
D.P.H.-P.H.P.
wm



City and County of San Francisco
London N. Breed
Mayor

San Francisco Department of Public Health
Grant Colfax, MD
Director of Health

Behested Payment Solicitation Rules Exception Form & Certification

Directions: Please complete, sign, and return pages 1-2 of the form below, filling in all blanks with the requested information and selecting only one of the three check boxes.

Name of Grant/Gift (the Award): 2025 UGM Registration Waiver and Travel Expense Reimbursement

Amount: \$12,710.44

Date Received & Term of Grant/Gift: 11/18/25 for UGM 2025

Name of Original Source of the Grant/Gift (the Donor): Epic Systems Corporation

Purpose of Form: Section 3.620 of the San Francisco Campaign and Governmental Conduct Code (the SF C&GCC) prohibits City and County of San Francisco (City) officers and employees from directly or indirectly soliciting a behested payment from an interested party. A **behested payment** is a payment made at the request of the City officer or employee for a legislative, governmental, or charitable purpose. **Interested parties** include, among other things, either a) a participant involved in an administrative enforcement or license, permit, or other entitlement proceeding before any officer or employee within DPH or b) a person or entity that contracts with or seeks to contract with the City, the San Francisco Unified School District, or the San Francisco Community College District where the total anticipated or actual value of such contracts within a fiscal year equals or exceeds \$100,000. **Interested parties** also include contract or expenditure lobbyists and permit consultants. Donors should refer to Section 3.620 of the SF C&GCC and related rules and regulations for more detailed information about behested payments.

This form is to be used by the San Francisco Department of Public Health (DPH) and the Donor listed above to certify that the listed Award is not a solicitation of a behested payment as determined by Regulation 3.620-8 of the San Francisco Ethics Commission Regulations. Awards that meet the criteria listed in Regulation 3.620-8 for not being a solicited behested payment are exempt from the prohibition listed in Section 3.620 of the San Francisco Campaign and Governmental Conduct Code and can be accepted and expended by the City and/or DPH.

Certification: Donor may be an interested party as defined in Section 3.620 of the SF C&GCC and related Ethics Commission Regulations. Because Donor is also the source of the Award listed above (*either as the original source or as an intermediary that is sub-awarding from a different source*), the City can only accept the funds if the Award qualifies for an exception to the restriction on soliciting a behested payment from an interested party under Section 3.620 of the SF C&GCC or Ethics Commission Regulations.



City and County of San Francisco
London N. Breed
Mayor

San Francisco Department of Public Health
Grant Colfax, MD
Director of Health

Behested Payment Solicitation Rules Exception Form & Certification

Please certify, by selecting which one of the following options is most applicable, that the listed information is accurate related to the Award listed above:

☐ **Competitive Award.** The Award is being made by Donor pursuant to a competitively awarded grant for which DPH or a DPH designee applied, as described in Ethics Commission Regulation 3.620-8(a) (*copy located on back page*). Donor certifies that the Award is competitively awarded under its own processes—the SF C&GCC and Ethics Commission Regulations do not define that concept. Note that the negotiation by DPH and the Donor and expansion of the terms of any such grant agreement does not make the Award a prohibited behested payment.

☐ **Award Initiated by Donor with a Grant Agreement.** The Award is being made by Donor pursuant to a grant agreement between Donor and the City/DPH, and the Award was initiated by Donor, as described in Ethics Commission Regulation 3.620-8(b) (*copy located on back page*). Donor certifies that the Award was not initiated by DPH or a DPH designee. Note that the negotiation by DPH and the Donor and expansion of the terms of any such grant agreement, after initiation by the Donor, does not make the Award a prohibited behested payment.

☒ **Award Initiated by Donor Without a Grant Agreement.** The Award is a gift or other payment from Donor to the City/DPH, and the Award was initiated by Donor, as described in Ethics Commission Regulation 3.620-8(c) (*copy located on back page*). Donor certifies that the Award was not initiated by DPH or a DPH designee. This gift or payment must not confer a personal benefit on any City official or employee. Gifts or payments that confer a personal benefit include, but are not limited to, food, drinks, holiday parties, and items intended for employee appreciation or recognition.

I [Signatory Name] Jacob Engel, as an authorized representative of Donor, certify and affirm that the above information is true and accurate, and I acknowledge that providing false or inaccurate information may violate City rules. I am authorized to and accordingly confirm that Donor, upon request by City, DPH, and/or the San Francisco Ethics Commission, will provide any requested documentation that Donor is legally allowed to provide which demonstrates the accuracy of the statements above.

Jacob Engel
Signatory

11/18/25
Date

Analyst
Signatory Title



City and County of San Francisco
London N. Breed
Mayor

San Francisco Department of Public Health
Grant Colfax, MD
Director of Health

Behested Payment Solicitation Rules Exception Form & Certification

Copy of Relevant Ethics Commission Regulations for Reference (Aug. 2024)
(please go to [Ethics Commission Regulations](#) for the current, applicable regulations)

Regulation 3.620-8: Exceptions

The following actions are not solicitations of behested payments for the purposes of Section 3.620:

- (a) Applying for a competitively awarded grant with or directly from an interested party, if the City officer or designated employee is applying on behalf of their department. Negotiating the terms of, entering into, performing pursuant to, amending, and expanding such a grant agreement between the source of the grant, the interested party, and the City is also not soliciting a behested payment.
- (b) Negotiating the terms of, entering into, performing pursuant to, amending, or expanding a grant agreement between an interested party and the City, on behalf of the officer or designated employee's department, that was initiated by an interested party. Any City officer or designated employee using this exception bears the burden of proving that they did not initiate the grant offer or negotiations. This proof could be demonstrated, for example, through copies of emails or other written communications or other means.
- (c) Coordinating the acceptance of gifts or other payments to the City that have been initiated by an interested party. Any City officer or designated employee using this exception bears the burden of proving that they did not initiate the payment from the interested party. This proof could be demonstrated, for example, through copies of emails or other written communications or other means. Any gift or payment accepted using this exception cannot confer a personal benefit on any City officials. Gifts or payments that confer a personal benefit include, but are not limited to food, drinks, holiday parties, and items intended for employee appreciation or recognition. ...

RECEIVED
CITY OF SAN FRANCISCO
JUL 25 2024
10:29 AM
D. H. P.



City and County of San Francisco
London N. Breed
Mayor

San Francisco Department of Public Health

Grant Colfax, MD
Director of Health



Department of
PUBLIC HEALTH

11/18/25

Epic Systems Corporation
1979 Milky Way
Verona WI 53593

To Whom it may Concern,

Thank you for your generous contribution to the San Francisco Department of Public Health (DPH). In order to help DPH comply with the San Francisco Sunshine Ordinance,* we ask that you please complete this form and return it as soon as possible to: Department of Public Health, 101 Grove St #110, San Francisco CA 94102.

Contributor & Contribution Information:

Name: Epic Systems Corporation _____

Phone: (608) 271-9000 _____

Money, Goods, or Services (description):

Money _____

Date: 11/18/25 _____

Address: 1979 Milky Way _____

Verona, WI 53593 _____

Estimated Value: \$12,710.44 _____

The above address is a: ☒ Business ☐ Residence

Financial Interest:

The San Francisco Sunshine Ordinance requires that a department that receives a gift of money, goods, or services worth more than \$100 in the aggregate to report any financial interest that the contributor has involving the City and County of San Francisco (the City). Please check the appropriate box or boxes that describe your financial interest in the City.

☒ Contract with City

☐ Grant from the City

☐ Lease of Space to or from the City

☐ City License, Permit, or Entitlement for Use

☐ Other Financial Interest

☐ Pending Financial Interest

☐ No Financial Interest

(Please describe): Software & Services through subsidiary

(Please describe): _____

(Please describe): _____

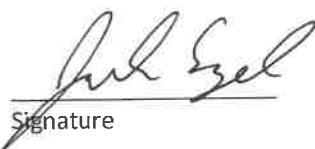
(Please describe): _____

(Please describe): _____

(Please describe): _____

*San Francisco Administrative Code Chapter 67 section 67.29-6 (Sources of Outside Funding) provides:

No official or employee or agent of the City shall accept, allow to be collected, or direct or influence the spending of any money or any goods or services worth more than one hundred dollars in aggregate, for the purpose of carrying out or assisting any City function unless the amount and source of all such funds is disclosed as a public record and made available on the website for the department to which the funds are directed. When such funds are provided or managed by an entity, and not an individual, that entity must agree in writing to abide by this ordinance. The disclosure shall include the names of all individuals or organizations contributing such money and a statement as to any financial interest the contributor has involving the City.


Signature

11/18/25
Date

RECEIVED
CASHIER
2025 DEC -1 PM 3:22
D.P.H.-P.H.F.



San Francisco
Department of Public Health
City and County of San Francisco
Mayor Daniel L. Lurie

Sunday, January 4, 2026

Epic Systems Corporation
1979 Milky Way
Verona WI 53593

Dear **Jacob Engel**,

Thank you for your contribution of cash received on December 1, 2025. Please keep this written acknowledgement of your gift to the City for your tax records.

Description of Donated Property:

(It is the responsibility of the donor to estimate the fair market value of donated items)

Description of Donated property	Quantity	Cash Value	Financial Interest
Check	1	\$12,710.44	Contract with City

No goods or services were provided by the City in connection with the gift.

Thank you for your support!

Very truly yours,

Signed by:
A handwritten signature in black ink that reads "jenny louie for daniel tsai".
40CFE25DD8B4464...

Daniel Tsai
Director of Health
Department of Public Health
San Francisco CA 94102

Wong, Greg (DPH)

From: Jenna Timm <Jenna@epic.com>
Sent: Tuesday, May 12, 2026 2:03 PM
To: Wong, Greg (DPH); Jacob Engel; Greg Strodtman; Deborah Wohl; Zach Blair; Tim Thompson
Cc: FQHC; Conover, Lily (DPH); Chiong, Christina (DPH)
Subject: Re: Request information on check details

Hi Greg -

The UGM / XGM amounts are intended to cover the travel your staff incurred to get to Epic for those conferences and are based on the travel expenses you submitted.

Apologies for the delayed response. The emails showed up as encrypted and unopenable.

Jenna

From: Wong, Greg (DPH) <greg.wong@sfdph.org>
Sent: Tuesday, May 12, 2026 12:46 PM
To: Jacob Engel <Jacob@epic.com>; Greg Strodtman <gstrodtm@epic.com>; Deborah Schilling <dschilli@epic.com>; Zach Blair <zblair@epic.com>; Tim Thompson <tthompso@epic.com>
Cc: Jenna Timm <Jenna@epic.com>; FQHC <FQHC@epic.com>; Conover, Lily (DPH) <lily.conover@sfdph.org>; Chiong, Christina (DPH) <Christina.Chiong@sfdph.org>
Subject: RE: Request information on check details

Hello,

Sorry, just following up.

Sincerely,

Greg

From: Wong, Greg (DPH)
Sent: Thursday, May 7, 2026 9:17 AM
To: Jacob Engel <Jacob@epic.com>; Greg Strodtman <gstrodtm@epic.com>; Deborah Wohl <dschilli@epic.com>; Zach Blair <zblair@epic.com>; Tim Thompson <tthompso@epic.com>
Cc: Jenna Timm <Jenna@epic.com>; FQHC <FQHC@epic.com>; Conover, Lily (DPH) <lily.conover@sfdph.org>
Subject: RE: Request information on check details

Hi Jacob,

Sorry, just following up.

Sincerely,

Greg

From: Wong, Greg (DPH)
Sent: Monday, May 4, 2026 9:41 AM
To: 'Jacob Engel' <Jacob@epic.com>; Greg Strodman <gstrodsm@epic.com>; Deborah Wohl <dschilli@epic.com>; Zach Blair <zblair@epic.com>; Tim Thompson <tthompso@epic.com>
Cc: Jenna Timm <Jenna@epic.com>; FQHC <FQHC@epic.com>; Conover, Lily (DPH) <lily.conover@sfdph.org>
Subject: RE: Request information on check details

Hi Jacob,

Sorry to bother you again, our Controller's department was asking, are the gift funds only to be used to attend conferences, or can we at DPH determine the usage of the funds?

Sincerely,

Greg

From: Jacob Engel <Jacob@epic.com>
Sent: Wednesday, April 22, 2026 3:24 PM
To: Wong, Greg (DPH) <greg.wong@sfdph.org>; Greg Strodman <gstrodsm@epic.com>; Deborah Wohl <dschilli@epic.com>; Zach Blair <zblair@epic.com>; Tim Thompson <tthompso@epic.com>
Cc: Jenna Timm <Jenna@epic.com>; FQHC <FQHC@epic.com>; Conover, Lily (DPH) <lily.conover@sfdph.org>
Subject: Re: Request information on check details

Correct, we do not require any reporting of how the funds are used.

The names simply refer to the fact that they're being given under our Safety Net giving program. The 2025 Gift is simply cash to help you care for your needy patients better. The UGM or XGM designation reflect the fact that this our help for you to attend those conferences — with some people having registration fees and travel expenses reimbursed and any additional travelers having 50% of their registration fees refunded.

From: Wong, Greg (DPH) <greg.wong@sfdph.org>
Sent: Wednesday, April 22, 2026 4:37 PM
To: Greg Strodman <gstrodsm@epic.com>; Deborah Schilling <dschilli@epic.com>; Zach Blair <zblair@epic.com>; Tim Thompson <tthompso@epic.com>
Cc: Jacob Engel <Jacob@epic.com>; Jenna Timm <Jenna@epic.com>; FQHC <FQHC@epic.com>; Conover, Lily (DPH) <lily.conover@sfdph.org>
Subject: RE: Request information on check details

Hello all,

I apologize, our Controllers department wanted to confirm that the Safety Net and FQHC gifts do not need to be tracked, and do not require reporting to Epic. They also want to ask about the significance and usage of the various names of the gifts such as “2025 UGM Safety Net Gift” for \$12,710.44 and “2025 Safety Net Gift” for \$115,000. Can you advise?

Sincerely,

Greg

From: Greg Strodman <gstrodtm@epic.com>
Sent: Wednesday, January 7, 2026 2:04 PM
To: Wong, Greg (DPH) <greg.wong@sfdph.org>; Deborah Wohl <dschilli@epic.com>; Zach Blair <zblair@epic.com>; Tim Thompson <tthompso@epic.com>
Cc: Jacob Engel <jacob@epic.com>; Jenna Timm <jenna@epic.com>; FQHC <FQHC@epic.com>; Chiong, Christina (DPH) <Christina.Chiong@sfdph.org>; Conover, Lily (DPH) <lily.conover@sfdph.org>
Subject: Re: Request information on check details

Greg,
I do not believe that this is for FQHCs. @Tim Thompson, could you review?

Best,
Greg Strodman

From: Wong, Greg (DPH) <greg.wong@sfdph.org>
Sent: Wednesday, January 7, 2026 3:50 PM
To: Greg Strodman <gstrodtm@epic.com>; Deborah Schilling <dschilli@epic.com>; Zach Blair <zblair@epic.com>; Tim Thompson <tthompso@epic.com>
Cc: Jacob Engel <jacob@epic.com>; Jenna Timm <jenna@epic.com>; FQHC <FQHC@epic.com>; Chiong, Christina (DPH) <Christina.Chiong@sfdph.org>; Conover, Lily (DPH) <lily.conover@sfdph.org>
Subject: RE: Request information on check details

Hello all,

Thank you very much for the attached donation! Would it be possible to complete the attached forms and return back to me?

Sincerely,

Greg

From: Greg Strodman <gstrodtm@epic.com>
Sent: Tuesday, January 14, 2025 5:34 AM
To: Wong, Greg (DPH) <greg.wong@sfdph.org>; Scarafia, Jeff (DPH) <jeff.scarafia@sfdph.org>; Deborah Wohl <dschilli@epic.com>; Zach Blair <zblair@epic.com>; Tim Thompson <tthompso@epic.com>
Cc: Challco Ynca, Lourdes (DPH) <lourdes.challco@sfdph.org>; Jacob Engel <jacob@epic.com>; Jenna Timm <jenna@epic.com>; FQHC <FQHC@epic.com>; Chiong, Christina (DPH) <Christina.Chiong@sfdph.org>
Subject: RE: Request information on check details

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Greg,

We were able to track this down after a bit of sleuthing.

@Tim Thompson can be the person to review the unrestricted gift, I'm the right person for the FQHCs. Just let us know when you've finalized the forms!

Best,
Greg

From: Wong, Greg (DPH) <greg.wong@sfdph.org>
Sent: Monday, January 13, 2025 6:44 PM
To: Scarafia, Jeff (DPH) <jeff.scarafia@sfdph.org>; Deborah Schilling <dschilli@epic.com>; Zach Blair <zblair@epic.com>
Cc: Challco Ynca, Lourdes (DPH) <lourdes.challco@sfdph.org>; Jacob Engel <jacob@epic.com>; Greg Strodman <gstrodtm@epic.com>; Jenna Timm <jenna@epic.com>; FQHC <FQHC@epic.com>; Chiong, Christina (DPH) <Christina.Chiong@sfdph.org>
Subject: RE: Request information on check details

External Mail

CCing others for information below.

Sincerely,

Greg

From: Scarafia, Jeff (DPH) <jeff.scarafia@sfdph.org>
Sent: Monday, January 13, 2025 4:41 PM
To: Deborah Wohl <dschilli@epic.com>; Zach Blair <zblair@epic.com>
Cc: Wong, Greg (DPH) <greg.wong@sfdph.org>; Challco Ynca, Lourdes (DPH) <lourdes.challco@sfdph.org>
Subject: RE: Request information on check details

@Deborah Schilling & @Zach Blair (don't know if this is something Zach has),

We're having trouble on our side located the donations you highlighted shared in the attached. Specifically the FY20/21 for \$25k and the FY21/22 for \$29k. Are you able to locate check numbers associated with these gifts?

	A	B	C	D	E	F	G	
1								
2		FUND	DEPT	AUTH	PROJ	ACCT	ACTV	B:
3	FQHC License Fees	14820	162643	10001	10036449		0001	
4	FQHC Maintenance Fees	14820	162643	10001	10036449		0001	
5	Safety Net UGM Travel	14820	162643	10001	10038970		0001	
5	Safety Net XGM Travel							
7	Safety Net Unrestricted	14820	162643	10001	10034351	520/521	0001	
3	General Gifting							
3	-> BHS Project							
0	-> Community Resource Directory Project							
1	-> RAMS Program							
2								
3								

Jeff Scarafia

Deputy CIO

San Francisco Department of Public Health

jeff.scarafia@sfdph.org

[Link to the DPH IT Service Portal](#)

Office: 628.206.1236

ZSFG, 1001 Potrero Ave, Bldg. 40, 4th floor, San Francisco, CA 94110

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From: Challco Ynca, Lourdes (DPH) <lourdes.challco@sfdph.org>

Sent: Friday, January 10, 2025 5:40 PM

To: Scarafia, Jeff (DPH) <jeff.scarafia@sfdph.org>

Cc: Wong, Greg (DPH) <greg.wong@sfdph.org>

Subject: RE: Request information on check details

Good afternoon, Jeff,

Thank you for sharing the spreadsheet with me. I've reviewed it and attached the updated file. I've added a column indicating the project number for each amount.

However, we identified two issues:

1. Under "General Gifting" we couldn't locate the \$25,000 and \$29,000 allocated to the Epic Gift. These amounts are not linked to a project. Greg will be creating a new project number for the most recent \$37,000 check#362529.
2. In your spreadsheet under the "BHS Project and Community Resource Directory", the check for 37,500 (\$19,000 + \$18,500) has been deposited under "Safety Net" project#10035431. A new project wasn't

created for these funds. Should this be corrected, or is it acceptable to leave it under the “Safety Net” Project?

Please find the attached spreadsheet. In the “FSP Reconciliation” tab, you’ll see the amounts and the projects they correspond to.

Looking forward for your feedback.

Lourdes.

From: Scarafia, Jeff (DPH) <jeff.scarafia@sfdph.org>
Sent: Friday, January 10, 2025 12:31 PM
To: Challco Ynca, Lourdes (DPH) <lourdes.challco@sfdph.org>
Subject: RE: Request information on check details

Attached is where my knowledge of the \$25l and \$29k checks comes.

Deb is the Epic vendor account rep. I can reach out to her and the Epic accounting (zblair@epic.com) to see if they can locate more details about those two for us.

Jeff Scarafia

Deputy CIO
San Francisco Department of Public Health
jeff.scarafia@sfdph.org
[Link to the DPH IT Service Portal](#)
Office: 628.206.1236
ZSFG, 1001 Potrero Ave, Bldg. 40, 4th floor, San Francisco, CA 94110
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From: Challco Ynca, Lourdes (DPH) <lourdes.challco@sfdph.org>
Sent: Thursday, January 9, 2025 5:24 PM
To: Scarafia, Jeff (DPH) <jeff.scarafia@sfdph.org>
Subject: Request information on check details

Hi Jeff,

Before proceeding with creating a new project and chartfield, I wanted to ask if you have a check number, or any other details related to the \$25,000 or \$29,000 checks.

I’m also continuing to review and search for all the checks we’ve received for Epic and their status. Please let me know if you have insights or clues that could help.

	A	B	C	D	E	F	G	H	I
1									
2		FUND	DEPT	AUTH	PROJ	ACCT	ACTV	Balance as of 11/26/24	TOTALS
3	FQHC License Fees	14820	162643	10001	10036449		0001		\$8
4	FQHC Maintenance Fees	14820	162643	10001	10036449		0001		\$3
5	Safety Net UGM Travel	14820	162643	10001	10038970		0001		\$
5	Safety Net XGM Travel								\$
7	Safety Net Unrestricted	14820	162643	10001	10034351 520/521		0001		\$3
8	General Gifting								\$
9	-> BHS Project								\$
0	-> Community Resource Directory Project								\$
1	-> RAMS Program								\$
2									\$1,6
3									

Lourdes Chalco

Accountant II

Lourdes.chalco@sfdph.org

Department of Public Health

Confidential & Proprietary | No public disclosure except as provided in contract Exh 8

Confidential & Proprietary | No public disclosure except as provided in contract Exh 8

Confidential & Proprietary | No public disclosure except as provided in contract Exh 8

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Health Commission
City and County of San Francisco
Resolution No. 26-02

**RESOLUTION TO AUTHORIZE THE DEPARTMENT OF PUBLIC HEALTH TO ACCEPT AND EXPEND GIFTS OF
\$12,710.44, \$115,000, AND \$37,500 FROM THE EPIC SYSTEMS CORPORATION**

WHEREAS, The Epic Systems Corporation provides for the distribution of twelve thousand seven hundred ten dollars and forty-four cents (\$12,710.44), one hundred fifteen thousand dollars (\$115,000), and thirty-seven thousand five hundred dollars (\$37,500); and

WHEREAS, The Epic Safety Net Program comprises hospitals, clinics, emergency medical service treatment providers, and affiliate and contract treatment providers, all of which are under the Department of Public Health; and

WHEREAS, The Epic Systems Corporation has donated to the Department of Public Health in the amounts of \$12,710.44, \$115,000 and \$37,500 for the department's role as a Safety Net provider; and

WHEREAS, The Epic Systems Corporation provides gifts to entities that help low income and at-risk populations; therefore, be it

RESOLVED, That the Health Commission authorizes the Department of Public Health to accept and expend gifts of cash of twelve thousand seven hundred ten dollars and forty-four cents (\$12,710.44), one hundred fifteen thousand dollars (\$115,000) and thirty-seven thousand five hundred dollars (\$37,500) to support the goal of helping low income and at-risk populations; and be it

FURTHER RESOLVED, That the gift will be accepted and expended consistent with San Francisco Administrative Code Sections governing the acceptance of gifts to the City and County of San Francisco, including San Francisco Administrative Code Section 10.100-305.

I hereby certify that the San Francisco Health Commission at its meeting on February 2, 2026, adopted the foregoing resolution.



Mark Morewitz, MSW
Health Commission Executive Secretary



San Francisco Department of Public Health

Daniel Tsai
Director of Health

City and County of San Francisco
Daniel Lurie
Mayor

Memorandum

To: Honorable Members of the Board of Supervisors

From: San Francisco Department of Public Health

Date: Thursday, July 16, 2026

RE: **Retroactivity re: Files 260713, 260714, 260735**

This Resolution seeks authorization for the Department of Public Health (DPH) to retroactively accept and expend three in-kind gifts from Epic Systems Corporation.

File 260713 - Accept and Expend Gift - Retroactive - Epic Systems Corporation - 2025 UGM

Safety Net Grant - \$12,710.44 - DPH received the notice of award for this gift on December 1, 2025. Following Health Commission approval, DPH then forwarded the accept and expend packet to Controller's Office (CON) for review. The Controller's Office forwarded the packet to the Mayor's Office on May 28, 2026, for introduction on June 16, 2026.

File 260714: Accept and Expend Gift - Retroactive - Epic Systems Corporation - 2025 Safety Net

Gift - \$115,000 - DPH received the notice of award for this gift on January 21, 2026. Following Health Commission approval, DPH then forwarded the accept and expend packet to Controller's Office (CON) for review. The Controller's Office forwarded the packet to the Mayor's Office on May 28, 2026, for introduction on June 16, 2026.

File 260735: Accept and Expend Gift - Retroactive - Epic Systems Corporation - Help Low Income

and At-Risk Populations - 2025 Unrestricted Gift - \$37,500 - DPH received the notice of award for this gift on December 9, 2025. Following Health Commission approval, DPH then forwarded the accept and expend packet to the Controller's Office (CON) for review. The Controller's Office forwarded the packet to the Mayor's Office on June 9, 2026, for introduction on June 23, 2026.

We respectfully request retroactive authorization for these items. Please contact Greg Wong, Administrative Analyst, at greg.wong@sfdph.org for any questions about this request for retroactive authorization.

City and County of San Francisco

Department of Public Health



Daniel L. Lurie
Mayor

Daniel Tsai
Director of Health

TO: **Angela Calvillo, Clerk of the Board of Supervisors**

FROM: **Daniel Tsai**
Director of Health

DATE: **5/20/2026**

SUBJECT: **Gift Accept and Expend**

GIFT TITLE: **2025 UGM Safety Net Grant - \$12,710.44**

Attached please find the original and 1 copy of each of the following:

- ☒ Proposed Gift resolution, original signed by Department
- ☒ Gift information form, including disability checklist
- ☒ Budget and Budget Justification
- ☒ Agreement / Award Letter
- ☒ Other (Explain): Check, Behest Payment Exception Form, Gift Questionnaire, Gift Acknowledgement letter, Health Commission Resolution

Special Timeline Requirements:

Departmental representative to receive a copy of the adopted resolution:

Name: Gregory Wong (greg.wong@sfdph.org) Phone: 554-2521

Interoffice Mail Address: Dept. of Public Health, 101 Grove St # 108

Certified copy required Yes ☐

No ☒

OFFICE OF THE MAYOR
SAN FRANCISCO



DANIEL LURIE
MAYOR

TO: Angela Calvillo, Clerk of the Board of Supervisors
FROM: Dexter Darmali, Legislative & Ethics Secretary
RE: Accept and Expend Gift - Retroactive - Epic Systems Corporation - 2025 UGM Safety Net Grant - \$12,710.44
DATE: June 16, 2026

Resolution retroactively authorizing the Department of Public Health to accept and expend a monetary gift, entitled "2025 UGM Safety Net Grant," in the amount of \$12,710.44 from the Epic Systems Corporation to help low income and at-risk populations for the period of July 1, 2025, through June 30, 2026.

Should you have any questions, please contact Adam Thongsavat at adam.thongsavat@sfgov.org