

Purchasing & Contracting Department

April 13, 2026

VIA EMAIL TO: yvonne.zazueta@sharp.com

Ms. Yvonne C. Zazueta, Manager, Occupational Medicine
Sharp Rees-Stealy Medical Group
5651 Copley Drive, Suite A
San Diego, CA 92111

Reference: Request for Proposal (RFP) 10090302-26-L, Industrial Medical Services

Dear Ms. Zazueta:

Subject: Exceptions

Exhibit A, paragraph A.2.2 of the subject RFP, states, in pertinent part: "Any exceptions to the Contract that have not been accepted by the City in writing are deemed rejected. The City, in its sole discretion, may accept some or all of proposers' exceptions, reject proposer's exceptions and deem the proposal non-responsive, or award the Contract without proposer's proposed exceptions."

This letter confirms our agreement to clarify and modify the terms of the Contract relating to the above-referenced solicitation. The Parties agree as follows:

1. Article III, Section 3.2.5, **Extraordinary Work** (page 3 of 21) of Exhibit C, General Contract Terms and Provisions, shall be deleted in its entirety and replaced with the following:

3.2.5 (RESERVED)

2. Article III, Section 3.3 (page 4 of 21) of Exhibit C, General Contract Terms and Provisions, shall be deleted in its entirety and replaced with the following:

3.3 Annual Appropriation of Funds. Contractor acknowledges that the Contract term may extend over multiple City fiscal years, and that work and compensation under this Contract is contingent on the City Council appropriating funding for and authorizing such work and compensation for those fiscal years. This Contract may be terminated at the end of the fiscal year for which sufficient funding is not appropriated and authorized; such termination will be considered a termination for convenience on the part of the City. City is not obligated to pay Contractor for any amounts not duly appropriated and authorized by City Council; it is understood, however, that Contractor is not obligated to provide Services for which payment is not appropriated or authorized.

3. Article IV, Section 4.2 (page 4 of 21) of Exhibit C, General Contract Terms and Provisions, shall be deleted in its entirety and replaced with the following:

4.2 City's Right to Terminate for Convenience. City may, at its sole option and for its convenience, terminate all or any portion of this Contract by giving written notice of such termination to Contractor at least thirty (30) days prior to the effective date of termination. The termination of the Contract shall be effective upon receipt of the notice by Contractor. After termination of all or any portion of the Contract, Contractor shall: (1) immediately discontinue all affected performance (unless the notice directs otherwise); and (2) complete any and all additional work necessary for the orderly filing of documents and closing of Contractor's affected performance under the Contract. After filing of documents and completion of performance, Contractor shall deliver to City all data, drawings, specifications, reports, estimates, summaries, and such other information and materials created or received by Contractor in performing this Contract, whether completed or in process. By accepting payment for completion, filing, and delivering documents as called for in this section, Contractor discharges City of all of City's payment obligations and liabilities under this Contract with regard to the affected performance.

4. Article IV, Section 4.3 (page 5 of 21) of Exhibit C, General Contract Terms and Provisions, shall be deleted in its entirety and replaced with the following:

4.3 City's Right to Terminate for Default. Contractor's failure to satisfactorily perform any material obligation required by this Contract constitutes a default. Examples of default include a determination by City that Contractor has: (1) failed to deliver goods and/or perform the services of the required quality or within the time specified; (2) failed to perform any of the obligations of this Contract; and (3) failed to make sufficient progress in performance which may jeopardize full performance.

5. Article VI, Section 6.1 (page 9 of 21) of Exhibit C, General Contract Terms and Provisions, shall be deleted in its entirety and replaced with the following:

6.1 Rights in Data. If, in connection with the services performed under this Contract, Contractor or its employees, agents, or subcontractors are retained and paid to create artwork, audio recordings, blueprints, designs, diagrams, documentation, photographs, plans, reports, software, source code, specifications, surveys, system designs, video recordings, or any other original works of authorship, whether written or readable by machine (Deliverable Materials), all rights of Contractor or its subcontractors in the Deliverable Materials, including, but not limited to publication, and registration of copyrights, and trademarks in the Deliverable Materials, are the sole property of City. Contractor, including its employees, agents, and subcontractors, may not use any Deliverable Material for purposes unrelated to Contractor's work on behalf of the City without prior written consent of City. Contractor may not publish or reproduce any Deliverable

Materials, for purposes unrelated to Contractor's work on behalf of the City, without the prior written consent of the City.

6. Article VI, Section 6.6 (page 11 of 21) of Exhibit C, General Contract Terms and Provisions, shall be deleted in its entirety and replaced with the following:

6.6 Software Licensing. Contractor represents and warrants that, to its knowledge, any software developed and provided by Contractor, if any, as delivered to City, does not contain any program code, virus, worm, trap door, back door, time or clock that would erase data or programming or otherwise cause the software to become inoperable, inaccessible, or incapable of being used in accordance with its user manuals, either automatically, upon the occurrence of licensor-selected conditions or manually on command. Contractor further represents and warrants that all third-party software, delivered to City or used by Contractor in the performance of the Contract, is fully licensed by the appropriate licensor.

7. Article VII, Section 7.6 (page 14 of 21) of Exhibit C, General Contract Terms and Provisions, shall be deleted in its entirety and replaced with the following:

7.6 Special Risks or Circumstances. City reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances, upon notice to Contractor.

8. Article VIII, **BONDS** (page 14 of 21) of Exhibit C, General Contract Terms and Provisions, shall be deleted in its entirety and replaced with the following:

ARTICLE VIII (RESERVED)

Please indicate your agreement with the above by signing the bottom of this letter. Thank you for your assistance.

Sincerely,



Taylor Cox
Senior Procurement Contracting Officer

Ms. Yvonne C. Zazueta, Manager, Occupational Medicine
April 13, 2026

This Letter is executed by the City and Contractor acting by and through their authorized officers.

CONTRACTOR
Sharp Rees-Stealy Medical Group

By: Michael Martin, MD
Michael Martin, MD (Apr 14, 2026 18:02:25 PDT)

Name: Michael Martin, MD

Title: President, SRSMG

Date: 04/14/2026

THE CITY OF SAN DIEGO

By: C. Abarca

Name: Claudia Abarca

Title: Director, Purchasing & Contracting

Date: 06/03/2026

**CONTRACT RESULTING FROM REQUEST FOR PROPOSAL NUMBER 10090302-26-L,
INDUSTRIAL MEDICAL SERVICES**

This Contract (Contract) is entered into by and between the City of San Diego, a municipal corporation (City), and the successful proposer to Request for Proposal (RFP) # 10090302-26-L, INDUSTRIAL MEDICAL SERVICES (Contractor).

RECITALS

On or about 8/12/2025, City issued an RFP to prospective proposers on services to be provided to the City. The RFP and any addenda and exhibits thereto are collectively referred to as the "RFP." The RFP is attached hereto as Exhibit A.

City has determined that Contractor has the expertise, experience, and personnel necessary to provide the services.

City wishes to retain Contractor to provide industrial medical services as further described in the Scope of Work, attached hereto as Exhibit B. (Services).

For good and valuable consideration, the sufficiency of which is acknowledged, City and Contractor agree as follows:

**ARTICLE I
CONTRACTOR SERVICES**

1.1 Scope of Work. Contractor shall provide the Services to City as described in Exhibit B which is incorporated herein by reference. Contractor will submit all required forms and information described in Exhibit A to the Purchasing Agent before providing Services.

1.2 General Contract Terms and Provisions. This Contract incorporates by reference the General Contract Terms and Provisions, attached hereto as Exhibit C.

1.3 Contract Administrator. The Risk Management Department (Department) is the Contract Administrator for this Agreement. Contractor shall provide the Services under the direction of a designated representative of the Department as follows:

Joseph Sousa, Workers' Compensation & Insurance Manager
1200 Third Avenue, Suite 1000
San Diego, CA 92101
(619) 236-5958
JSousa@sandiego.gov

**ARTICLE II
DURATION OF CONTRACT**

2.1 Term. This Contract shall be for a period of five (5) years beginning on the Effective Date. Unless otherwise terminated, this Contract shall be effective until completion of the Scope of Services. The term of this Contract shall not exceed five years unless approved by the City Council by ordinance.

2.2 Effective Date. This Contract shall be effective on the date it is executed by the last Party to sign the Contract and approved by the City Attorney in accordance with San Diego Charter Section 40.

ARTICLE III COMPENSATION

3.1 Amount of Compensation. City shall pay Contractor for performance of all Services rendered in accordance with this Contract in an amount not to exceed \$10,000,000. ^{MCM}
(The not to exceed amount will be added in this final Contract prior to the final execution of the Contract by the City, with the Contractor's initials indicating acceptance.)

ARTICLE IV WAGE REQUIREMENTS

4.1 Reserved.

ARTICLE V CONTRACT DOCUMENTS

5.1 Contract Documents. The following documents comprise the Contract between the City and Contractor: this Contract and all exhibits thereto, the RFP; the Notice to Proceed; and the City's written acceptance of exceptions or clarifications to the RFP, if any.

5.2 Contract Interpretation. The Contract Documents completely describe the Services to be provided. Contractor will provide any Services that may reasonably be inferred from the Contract Documents or from prevailing custom or trade usage as being required to produce the intended result whether or not specifically called for or identified in the Contract Documents. Words or phrases which have a well-known technical or construction industry or trade meaning and are used to describe Services will be interpreted in accordance with that meaning unless a definition has been provided in the Contract Documents.

5.3 Precedence. In resolving conflicts resulting from errors or discrepancies in any of the Contract Documents, the Parties will use the order of precedence as set forth below. The 1st document has the highest priority. Inconsistent provisions in the Contract Documents that address the same subject, are consistent, and have different degrees of specificity, are not in conflict and the more specific language will control. The order of precedence from highest to lowest is as follows:

- 1st Any properly executed written amendment to the Contract
- 2nd The Contract
- 3rd The RFP and the City's written acceptance of any exceptions or clarifications to the RFP, if any
- 4th Contractor's Proposal

5.4 Counterparts. This Contract may be executed in counterparts which, when taken together, shall constitute a single signed original as though all Parties had executed the same page.

5.5 Public Agencies. Other public agencies, as defined by California Government Code section 6500, may choose to use the terms of this Contract, subject to Contractor's acceptance. The City is not liable or responsible for any obligations related to a subsequent Contract between Contractor and another public agency.

IN WITNESS WHEREOF, this Contract is executed by City and Contractor acting by and through their authorized officers.

CONTRACTOR

Sharp Rees-Stealy Medical Group

Proposer

5651 Copley Drive, Ste A

Street Address

San Diego

City

858-262-6006

Telephone No.

michael.martinmd@sharp.com

E-Mail

CITY OF SAN DIEGO
A Municipal Corporation

BY:



Print Name: Claudia Abarca

Director, Purchasing & Contracting

Title

06/03/2026

Date Signed

BY:

Michael Martin, MD

Michael Martin, MD (Apr 14, 2026 18:02:25 PDT)

Signature of
Proposer's Authorized
Representative

Michael Martin, MD

Print Name

President, SRSMG

Title

04/14/2026

Date

Approved as to form this 8th day of

June, 2026.

HEATHER FERBERT, City Attorney

BY: Thomas J. Brady

Thomas J. Brady (Jun 8, 2026 11:56:34 PDT)

Deputy City Attorney

Document No: R-316759



EXHIBIT A
PROPOSAL SUBMISSION AND REQUIREMENTS

A. PROPOSAL SUBMISSION

1. Timely Proposal Submittal. Proposals must be submitted as described herein to the Purchasing & Contracting Department (P&C).

1.1 Reserved.

1.2 Paper Proposals. The City will accept paper proposals in lieu of eProposals. Paper proposals must be submitted in a sealed envelope to the Purchasing & Contracting Department (P&C) located at 1200 Third Avenue, Suite 200, San Diego, CA 92101. The Solicitation Number and Closing Date must be referenced in the lower left-hand corner of the outside of the envelope. Faxed proposals will not be accepted.

1.3 Proposal Due Date. Proposals must be submitted prior to the Closing Date indicated on the eBidding System. E-mailed and/or faxed proposals will not be accepted.

1.4 Pre-Proposal Conference. No pre-proposal conference will be held for RFP.

1.4.1 Reserved.

1.5 Questions and Comments. Written questions and comments must be submitted electronically via the eBidding System no later than the date specified on the eBidding System. Only written communications relative to the procurement shall be considered. The City's eBidding System is the only acceptable method for submission of questions. All questions will be answered in writing. The City will distribute questions and answers without identification of the inquirer(s) to all proposers who are on record as having received this RFP, via its eBidding System. No oral communications can be relied upon for this RFP. Addenda will be issued addressing questions or comments that are determined by the City to cause a change to any part of this RFP.

1.6 Contact with City Staff. Unless otherwise authorized herein, proposers who are considering submitting a proposal in response to this RFP, or who submit a proposal in response to this RFP, are prohibited from communicating with City staff about this RFP from the date this RFP is issued until a contract is awarded.

2. Proposal Format and Organization. Unless electronically submitted, all proposals should be securely bound and must include the following completed and executed forms and information presented in the manner indicated below:

Tab A - Submission of Information and Forms.

2.1 Completed and signed Contract Signature Page. If any addenda are issued, the latest Addendum Contract Signature Page is required.

2.2 Exceptions requested by proposer, if any. The proposer must present written factual or legal justification for any exception requested to the Scope of Work, the Contract, or the Exhibits thereto. Any exceptions to the Contract that have not been accepted by the City in writing are deemed rejected. The City, in its sole discretion, may accept some or all of

proposer's exceptions, reject proposer's exceptions, and deem the proposal non-responsive, or award the Contract without proposer's proposed exceptions. The City will not consider exceptions addressed elsewhere in the proposal.

2.3 The Contractor Standards Pledge of Compliance Form.

2.4 Equal Opportunity Contracting forms including the Work Force Report and Contractors Certification of Pending Actions.

2.5 Reserved.

2.6 Licenses as required in Exhibit B.

2.7 Reserved.

2.8 Additional Information as required in Exhibit B.

2.9 Reserved.

Tab B – Executive Summary and Responses to Specifications.

2.10 A title page.

2.11 A table of contents.

2.12 An executive summary, limited to one typewritten page, that provides a high-level description of the proposer's ability to meet the requirements of the RFP and the reasons the proposer believes itself to be best qualified to provide the identified services.

2.13 Proposer's response to the RFP.

Tab C – Cost/Price Proposal (if applicable). Proposers shall submit a cost proposal in the form and format described herein. Failure to provide cost(s) in the form and format requested may result in proposal being declared non-responsive and rejected.

3. Proposal Review. Proposers are responsible for carefully examining the RFP, the Specifications, this Contract, and all documents incorporated into the Contract by reference before submitting a proposal. If selected for award of contract, proposer shall be bound by same unless the City has accepted proposer's exceptions, if any, in writing.

4. Addenda. The City may issue addenda to this RFP as necessary. All addenda are incorporated into the Contract. The proposer is responsible for determining whether addenda were issued prior to a proposal submission. Failure to respond to or properly address addenda may result in rejection of a proposal.

5. Quantities. The estimated quantities provided by the City are not guaranteed. These quantities are listed for informational purposes only. Quantities vary depending on the demands of the City. Any variations from the estimated quantities shall not entitle the proposer to an adjustment in the unit price or any additional compensation.

6. Quality. Unless otherwise required, all goods furnished shall be new and the best of their kind.

6.1 Items Offered. Proposer shall state the applicable trade name, brand, catalog, manufacturer, and/or product number of the required good, if any, in the proposal.

6.2 Brand Names. Any reference to a specific brand name in a solicitation is illustrative only and describes a component best meeting the specific operational, design, performance, maintenance, quality, or reliability standards and requirements of the City. Proposer may offer an equivalent or equal in response to a brand name referenced (Proposed Equivalent). The City may consider the Proposed Equivalent after it is subjected to testing and evaluation which must be completed prior to the award of contract. If the proposer offers an item of a manufacturer or vendor other than that specified, the proposer must identify the maker, brand, quality, manufacturer number, product number, catalog number, or other trade designation. The City has complete discretion in determining if a Proposed Equivalent will satisfy its requirements. It is the proposer's responsibility to provide, at their expense, any product information, test data, or other information or documents the City requests to properly evaluate or demonstrate the acceptability of the Proposed Equivalent, including independent testing, evaluation at qualified test facilities, or destructive testing.

7. Modifications, Withdrawals, or Mistakes. Proposer is responsible for verifying all prices and extensions before submitting a proposal.

7.1 Modification or Withdrawal of Proposal Before Proposal Opening. Prior to the Closing Date, the proposer or proposer's authorized representative may modify or withdraw the proposal by providing written notice of the proposal modification or withdrawal to the City Contact via the eBidding System. E-mail or telephonic withdrawals or modifications are not permissible.

7.2 Proposal Modification or Withdrawal of Proposal After Proposal Opening. Any proposer who seeks to modify or withdraw a proposal because of the proposer's inadvertent computational error affecting the proposal price shall notify the City Contact identified on the eBidding System no later than three working days following the Closing Date. The proposer shall provide worksheets and such other information as may be required by the City to substantiate the claim of inadvertent error. Failure to do so may bar relief and allow the City recourse from the bid surety. The burden is upon the proposer to prove the inadvertent error. If, as a result of a proposal modification, the proposer is no longer the apparent successful proposer, the City will award to the newly established apparent successful proposer. The City's decision is final.

8. Incurred Expenses. The City is not responsible for any expenses incurred by proposers in participating in this solicitation process.

9. Public Records. By submitting a proposal, the proposer acknowledges that any information submitted in response to this RFP is a public record subject to disclosure unless the City determines that a specific exemption in the California Public Records Act (CPRA) applies. If the proposer submits information clearly marked confidential or proprietary, the City may protect such information and treat it with confidentiality to the extent permitted by law. However, it will be the responsibility of the proposer to provide to the City the specific legal grounds on which the City can rely in withholding information requested under the CPRA should the City choose to withhold such information. General references to sections of the

CPRA will not suffice. Rather, the proposer must provide a specific and detailed legal basis, including applicable case law, that clearly establishes the requested information is exempt from the disclosure under the CPRA. If the proposer does not provide a specific and detailed legal basis for requesting the City to withhold proposer's confidential or proprietary information at the time of proposal submittal, City will release the information as required by the CPRA and proposer will hold the City, its elected officials, officers, and employees harmless for release of this information. It will be the proposer's obligation to defend, at proposer's expense, any legal actions or challenges seeking to obtain from the City any information requested under the CPRA withheld by the City at the proposer's request. Furthermore, the proposer shall indemnify and hold harmless the City, its elected officials, officers, and employees from and against any claim or liability, and defend any action brought against the City, resulting from the City's refusal to release information requested under the CPRA which was withheld at proposer's request. Nothing in the Contract resulting from this proposal creates any obligation on the part of the City to notify the proposer or obtain the proposer's approval or consent before releasing information subject to disclosure under the CPRA.

10. Right to Audit. The City Auditor may access proposer's records as described in San Diego Charter section 39.2 to confirm contract compliance.

B. PRICING

1. Fixed Price. All prices shall be firm, fixed, fully burdened, FOB destination, and include any applicable delivery or freight charges, and any other costs required to provide the requirements as specified in this RFP. The lowest total estimated contract price of all the proposals that meet the requirements of this RFP will receive the maximum assigned points to this category as set forth in this RFP. The other price schedules will be scored based on how much higher their total estimated contract prices compare with the lowest:

$$(1 - \frac{(\text{contract price} - \text{lowest price})}{\text{lowest price}}) \times \text{maximum points} = \text{points received}$$

For example, if the lowest total estimated contract price of all proposals is \$100, that proposal would receive the maximum allowable points for the price category. If the total estimated contract price of another proposal is \$105 and the maximum allowable points is 60 points, then that proposal would receive $(1 - ((105 - 100) / 100)) \times 60 = 57$ points, or 95% of the maximum points. The lowest score a proposal can receive for this category is zero points (the score cannot be a negative number). The City will perform this calculation for each Proposal.

2. Taxes and Fees. Taxes and applicable local, state, and federal regulatory fees should not be included in the price proposal. Applicable taxes and regulatory fees will be added to the net amount invoiced. The City is liable for state, city, and county sales taxes but is exempt from Federal Excise Tax and will furnish exemption certificates upon request. All or any portion of the City sales tax returned to the City will be considered in the evaluation of proposals.

3. Escalation. An escalation factor is not allowed unless called for in this RFP. If escalation is allowed, proposer must notify the City in writing in the event of a decline in market price(s) below the proposal price. At that time, the City will make an adjustment in the Contract or may elect to re-solicit.

4. Unit Price. Unless the proposer clearly indicates that the price is based on consideration of being awarded the entire lot and that an adjustment to the price was made based on receiving the entire proposal, any difference between the unit price correctly extended and the total price shown for all items shall be offered shall be resolved in favor of the unit price.

C. EVALUATION OF PROPOSALS

1. Award. The City shall evaluate each responsive proposal to determine which proposal offers the City the best value consistent with the evaluation criteria set forth herein. The proposer offering the lowest overall price will not necessarily be awarded a contract.

2. Sustainable Materials. Consistent with Council Policy 100-14, the City encourages use of readily recyclable submittal materials that contain post-consumer recycled content.

3. Evaluation Process.

3.1 Process for Award. A City-designated evaluation committee (Evaluation Committee) will evaluate and score all responsive proposals. The Evaluation Committee may require proposer to provide additional written or oral information to clarify responses. Upon completion of the evaluation process, the Evaluation Committee will recommend to the Purchasing Agent that award be made to the proposer with the highest scoring proposal.

3.2 Reserved.

3.3 Mandatory Interview/Oral Presentation. The City will require all proposers to interview and/or make an oral presentation. Interviews and/or oral presentations will be made to the Evaluation Committee in order to clarify the proposals and to answer any questions. The interviews and/or oral presentations will be scored as part of the selection process. The City will complete all reference checks prior to any oral interview. Additionally, the Evaluation Committee may require proposer's key personnel to interview. Interviews may be by telephone and/or in person. Multiple interviews may be required. Proposers are required to complete their oral presentation and/or interviews within seven (7) workdays after the City's request. Proposers should be prepared to discuss and substantiate any of the areas of the proposal submitted, as well as proposer's qualifications to furnish the subject services. Proposer is responsible for any costs incurred for the oral presentation and interview of the key personnel.

3.4 Discussions/Negotiations. The City has the right to accept the proposal that serves the best interest of the City, as submitted, without discussion or negotiation. Contractors should, therefore, not rely on having a chance to discuss, negotiate, and adjust their proposals. The City may negotiate the terms of a contract with the winning proposer based on the RFP and the proposer's proposal or award the contract without further negotiation.

3.5 Inspection. The City reserves the right to inspect the proposer's equipment and facilities to determine if the proposer is capable of fulfilling this Contract. Inspection will include, but not limited to, survey of proposer's physical assets and financial capability. Proposer, by signing the proposal agrees to the City's right of access to physical assets and financial records for the sole purpose of determining proposer's capability to perform the Contract. Should the City conduct this inspection, the City reserves the right to disqualify a

proposer who does not, in the City's judgment, exhibit the sufficient physical and financial resources to perform this Contract.

3.6 Evaluation Criteria. The following elements represent the evaluation criteria that will be considered during the evaluation process:

	MAXIMUM EVALUATION POINTS
A. Responsiveness to the RFP.	15
1. Requested information included and thoroughness of response	
2. Clarity of response	
3. Executive Summary reflects an understanding of the needs of the City's Workers' Compensation Program	
4. Exceptions to the RFP	
B. Staffing Plan.	30
1. Experience with treating workers' compensation injuries in California	
2. Availability/Geographical locations of occupational health and specialty services	
3. Experience serving as an MPN provider in California	
4. Experience providing occupational health services to public agencies including sworn safety	
C. Firm's Capability to provide the services and expertise and Past Performance.	30
1. Relevant experience of the Proposer	
2. Previous relationship of firm and subcontractors in providing workers' compensation care	
3. Past /Prior Performance	
4. Capacity/Capability to meet The City of San Diego needs in providing timely occupational health and specialty care	
5. Reference checks	
D. Price.	10
E. Mandatory Demonstration/Presentation.	15
1. Real time operation	
2. Access to and view of medical records.	
3. Thoroughness and Clarity of Presentation	
SUB TOTAL MAXIMUM EVALUATION POINTS:	100
F. Participation by Small Local Business Enterprise (SLBE) or Emerging Local Business Enterprise (ELBE) Firms*	12
FINAL MAXIMUM EVALUATION POINTS INCLUDING SLBE/ELBE:	112

*The City shall apply a maximum of an additional 12 percentage points to the proposer's final score for SLBE OR ELBE participation. Refer to Equal Opportunity Contracting Form, Section V.

4. Rejection of All Proposals. The City may reject any and all proposals when to do so is in the City's best interests.

D. ANNOUNCEMENT OF AWARD

1. Award of Contract. The City will inform all proposers of its intent to award a Contract in writing.

2. Obtaining Proposal Results. No solicitation results can be obtained until the City announces the proposal or proposals best meeting the City's requirements. Proposal results may be obtained by: (1) e-mailing a request to the City Contact identified on the eBidding System or (2) visiting the P&C eBidding System to review the proposal results. To ensure an accurate response, requests should reference the Solicitation Number. Proposal results will not be released over the phone.

3. Multiple Awards. City may award more than one contract by awarding separate items or groups of items to various proposers. Awards will be made for items, or combinations of items, which result in the lowest aggregate price and/or best meet the City's requirements. The additional administrative costs associated with awarding more than one Contract will be considered in the determination.

E. PROTESTS. The City's protest procedures are codified in Chapter 2, Article 2, Division 30 of the San Diego Municipal Code (SDMC). These procedures provide unsuccessful proposers with the opportunity to challenge the City's determination on legal and factual grounds. The City will not consider or otherwise act upon an untimely protest.

F. SUBMITTALS REQUIRED UPON NOTICE OF INTENT TO AWARD. The successful proposer is required to submit the following documents to P&C **within ten (10) business days** from the date on the Notice of Intent to Award letter:

1. Insurance Documents. Evidence of all required insurance, including all required endorsements, as specified in Article VII of the General Contract Terms and Provisions.

2. Taxpayer Identification Number. Internal Revenue Service (IRS) regulations require the City to have the correct name, address, and Taxpayer Identification Number (TIN) or Social Security Number (SSN) on file for businesses or persons who provide goods or services to the City. This information is necessary to complete Form 1099 at the end of each tax year. To comply with IRS regulations, the City requires each Contractor to provide a Form W-9 prior to the award of a Contract.

3. Business Tax Certificate. Unless the City Treasurer determines a business is exempt, all businesses that contract with the City must have a current business tax certificate.

4. Reserved.

5. Reserved.

The City may find the proposer to be non-responsive and award the Contract to the next highest scoring responsible and responsive proposer if the apparent successful proposer fails to timely provide the required information or documents.

EXHIBIT B SCOPE OF WORK

A. BACKGROUND. The City of San Diego (City) self-insures and self-administers its Workers' Compensation (WC) liability. The City, through its Risk Management Department, employs thirty-three (33) claims professionals, as well as support staff, in its administration of approximately 5,100 open WC files. The City is dedicated to providing superior customer service, the best medical care, and all appropriate indemnity benefits to its injured employees. In support of this goal, the City has formed a Medical Provider Network (MPN) and works closely with its current Industrial Medical Service providers to ensure outstanding medical services to the City's injured workforce.

This Request for Proposal (RFP) is being issued to solicit proposals from qualified providers for Industrial Medical Services for the City's self-insured and self-administered Workers' Compensation Program. The City's two (2) current contracts for Industrial Medical Services are scheduled to expire May 17, 2026 and September 12, 2026.

B. OBJECTIVE. The City wishes to achieve best market value while securing the best medical care for City employees injured on the job. The City is requesting proposals from firms qualified to deliver Industrial Medical Services as specified herein. The objective of this RFP is to make an award to a qualified provider(s) which represents the best overall value to the City while at the same time meeting the specifications and requirements of this RFP and California Medical Provider Regulations.

C. REQUIREMENTS OVERVIEW.

1. Proposer is responsible for understanding and complying with all requirements of the RFP. Proposer shall ensure all subcontractors understand and comply with all requirements of the RFP.

2. Proposer and all subcontractors shall agree to abide by the medical treatment pricing guidelines in the California Labor section 5307.1 and in Title 8, California Code of Regulations, Article 5.3, Official Medical Fee Schedule (OFMS), and Article 5.5, Application of the Official Medical Fee Schedule (Treatment). Increases or decreases to fees covered by the above statutes shall occur during the contract period only when the State provides an increase or decrease in fee(s) or when non-fee scheduled services are pre-negotiated and approved by the City

3. All Proposer services shall, at a minimum, meet the requirements of the Code of Federal Regulations, Cal/OSHA, and National Institute for Occupational Safety and Health.

4. Proposer shall submit their medical records retention and confidentiality policies and procedures with proposal. All policies and procedures must conform to all applicable laws, rules, and regulations.

5. Proposer shall arrange to provide the following for industrially injured City employees. Please note: The City wishes to achieve best market value. Proposer shall provide their best pricing offer for each of the listed services, on Exhibit B, Section J, Pricing Proposal pages using the fees outlined in the State of California's OFMS as a guideline:

5.1 Outpatient Surgical Services.

5.2 Inpatient/Outpatient Hospital Services (other than out-patient surgical) if such services are available for the Proposer to provide. The City wishes to achieve the best market value along with the best hospital care available in San Diego County.

5.3 Radiological Services that shall include magnetic resonance imaging (MRI) scans, computerized axial tomography (CAT) scans, and all other scans used as a diagnostic service. Proposer shall provide a best pricing offer for the listed scans using the state's OMFS as a guideline.

5.4 Audiometric Services. Proposer shall provide audiometric examinations consisting of air conduction, pure tone testing at the following test frequencies for each ear individually: 500, 1,000, 2,000, 3,000, 4,000, 6,000 and 8,000 Hz. All test vehicles, vestibules, and equipment must meet OSHA and ANSI specifications for audiometric testing. Proposer shall provide a cost per employee for each protocol. Proposer shall include description of services provided and equipment utilized with their proposal. To provide pricing for this service see Exhibit B, Section J, Pricing Proposal pages, Section 1.

5.5 Respiratory Medical Services. To be considered for the respiratory medical examination component, Proposer must provide all the medical examination protocols outlined in section G in this Scope of Work. Proposer shall describe the services that shall be provided, the equipment that shall be utilized, and the cost per employee for each protocol. The occupational history protocol shown on Section J, Pricing Proposal pages, shall be performed for each employee who is required to wear a respirator. A copy of Proposer's medical history questionnaire must be included with the proposal. The respiratory physical examination shall include an evaluation of all vital signs necessary to determine an employee's fitness for wearing a respirator, given the employee's specific work setting (e.g. pulse, blood pressure, rate of respiration, etc.) and a clinical examination of the chest, heart, and face (for adequacy of respirator fit). The proposal shall state which vital signs will be evaluated and why, and describe the clinical examination offered. Proposer shall describe all equipment used in the Pulmonary Function Test.

The protocols shown on Exhibit B, Section J, Pricing Proposal pages, Section 3 shall be performed only when the examining physician has justifiable concern regarding health risk due to the use of the respirator, given an employee's specific work setting and only when the City has given prior approval. If Proposer believes that the medical assessment for all employees wearing a specific type of respirator (e.g., self-contained breathing apparatus) should include these protocols, then Proposer shall so indicate, with explanation, in their proposal.

5.6 Health and Safety Training: Proposer shall agree to provide health and safety training to City personnel. Each successful Proposer shall agree to provide the first 25 hours of consulting/training in safety/prevention services during each contract year at no cost to the City. For services exceeding the 25-hour no cost to the City provision, Proposer shall provide an hourly fee for physician and non-physician involvement for consulting/training in safety/prevention services. To provide pricing for this service, see Section J, Pricing Proposal pages, Section 4.

D. CORE REQUIREMENTS.

Medical Care for Industrially Injured or Ill City Employees

1. Proposer shall act as part of the City's MPN and provide medical treatment to City employees who sustain work related injuries or illnesses, in compliance with California Labor Code, Title 8, California Code of Regulations, and all other applicable laws, rules, and regulations. Labor Code and Code of Regulations requirements include, but are not limited to, Regulation 9785 (reporting duties of the Primary Treating Physician), Labor Code Section 4610 and Article 5.5.1 of the Code of Regulations (Medical Treatment Utilization Review), Labor Code Section 5307.1 and Articles 5.3 and 5.5 (various fee schedules for payment of medical care), and Labor Code Sections 4616 through 4616.5 and Regulations 9767.1 through 9767.16 (Medical Provider Networks). Proposer shall agree to abide by all modifications that may occur to all applicable laws, rules, and regulations during the contract period.
2. The City reserves the right to award multiple contracts as best suits the needs of the City.
3. Proposer, and all subcontractors, shall provide medical treatment during standard business days Monday through Friday, from 8am to 5pm. If medical treatment is needed after 5pm, on weekends, or on City observed holidays, Proposer shall make arrangements for the provision of medical treatment equal or superior to Proposer's. Proposer shall explain the methodology of providing the treatment in their proposal. Proposer shall provide City employees full service at Proposer's occupational medicine clinics on a walk-in, no appointment required basis. For previously scheduled appointments, in the case where a wait of 30 minutes or longer to see a physician for a medical appointment is anticipated, Proposer shall promptly offer City employees the opportunity to reschedule their appointment time.

City observed holidays are: New Year's Day, Martin Luther King, Jr. Day, Presidents' Day, Cesar Chavez Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veterans' Day, Thanksgiving Day, and Christmas Day

4. Proposer shall provide a toll-free phone number and Medical Access Assistants for City employee use, as defined in California Regulation 9767.5 g, h (1) and (2). Medical Access Assistants shall be available to take calls Monday through Saturday from 7 am to 8 pm PT and shall assist injured workers with securing treatment needs. All calls will be logged with date, time, and subject. Proposer shall provide the log to the City upon request.
5. Physician Assistants (PA). Proposer shall follow California Business and Professions Code Sections 3500 through 3546 and Title 16, California Code of Regulations, Sections 1399.540 through 1399.57, and all other applicable laws, rules, and regulations regarding Physician Assistants (PA) for purposes of providing medical care to City employees. PAs shall not remove or return a City employee from work without the review and signed approval of a licensed physician. If a City employee's initial examination for a new injury or illness is with a PA, the Doctor's First Report must be reviewed and signed by a California-licensed physician. Any time a PA believes an injury or illness is not medically job-related, a California licensed physician must review, approve, and sign the medical report. Proposer shall agree to provide, when requested by the City, the written guidelines, or protocols for those medical tasks the PA is allowed to perform, and the name of the physician assigned to supervise the job

performance of a given PA. Upon request, Proposer shall provide a California Physician Assistant license for each PA that will provide medical care to City Employees.

6. Proposer shall provide and adequately maintain medical facilities and equipment, available to industrially injured City employees, that includes, but is not limited to, the following:
 - 6.1 Exam rooms
 - 6.2 Laboratory services
 - 6.3 X-ray capabilities
 - 6.4 Pulmonary function equipment
 - 6.5 Electrocardiographic (EKG) equipment
 - 6.6 Diagnostic vision equipment
 - 6.7 Audiometric testing equipment
 - 6.8 Physical therapy facilities.
7. Proposer and all subcontractors shall complete the City's Industrial Disability Leave Slip (RM -1634/Medical Status Report- Attachment A) for each employee visit involving medical treatment or physical therapy. Completion of the RM-1634 form shall include timestamps of the City employee's arrival and departure time from the Proposer or subcontractor's facility. Proposer and all subcontractors shall agree to assist City's claims staff in returning employees to light duty, as appropriate. Proposer and all subcontractors shall provide City staff with written work restrictions, allowing city staff to select light duty positions, at the time of the injured worker's visit. The City will provide blank forms to designated contact of Proposer for distribution to their various clinics.
8. Proposer shall provide, at no additional cost to the City, the ability for the City to electronically access the Contractor's portal/information, such as required workers' compensation reports and medical information concerning an employee's latest medical exam. To facilitate City's verbal requests for information, Proposer shall maintain physicians and administrative staff conversant with California Workers' Compensation laws and regulations who shall answer City staff questions at no additional cost to the City. Proposer shall provide same-day notifications whenever a City employee is taken off or returned to work. Proposer shall make available a principal physician or physicians to verbally respond to issues relating to workplace exposures and medical issues, as needed. This service shall include consultation with City claims/safety staff, City Supervisory/Management staff, and City Attorney staff. Proposer shall identify the available physician or physicians designated to provide this service in their proposal.
9. Proposer shall agree to utilize the pharmacy benefit network plan contracted with the City of San Diego to provide pharmacy benefits. The City's current pharmacy benefit network plan is Cadence RX.

10. Proposer shall agree to develop data reporting criteria, in coordination with the City, for information relating to industrial medical services provided by Proposer. The mutually developed reporting criteria shall be provided to the City on a quarterly basis. When requested, proposer agrees to meet quarterly with City management staff at no additional cost to the City whether the quarterly meeting be held virtually or in person at City offices.
11. Within thirty (30) days of Notice to Proceed, Proposer shall establish a mutually agreeable review process to identify, monitor, and resolve complaints made by City employees, in full compliance with all confidentiality requirements and legal constraints. Proposer shall disclose all such complaints to the City's Workers' Compensation Program Manager within five (5) business days of receipt. Proposer shall provide weekly status reports to the City's Workers' Compensation Program Manager on all open complaints. Proposer shall notify the City's Workers' Compensation Program Manager within five (5) business days of resolution of final disposition of complaint.
12. Proper agrees to make its employees and its legal counsel available to the City by telephone and, when necessary, by personal appearance free of charge when cases are heard before the Workers' Compensation Appeals Board (WCAB). Proposer agrees to price all medical-legal testimony fees (depositions and WCAB testimony) in accordance with Title 8, California Code of Regulations, Section 9795.
13. Proposer and all subcontractors that provide outpatient or inpatient surgery shall agree that charges for surgical hardware or implants shall occur directly between the surgical facility and the hardware or implant manufacturer. The City will not accept bills directly from implant manufacturers or third-party billers. The hardware or implant manufacturer shall be the firm or company responsible for producing and/ or assembling the surgical hardware or implant. Proposer or subcontractor shall attach the manufacturer's invoice for the surgical hardware or implant to Proposer's or subcontractor's bill for services and forward the bill and invoice to the City.
14. Proposer shall not charge a "no show" fee for routine occupational medicine visits. Specialty medical appointments are excluded from this requirement.

E. MEDICAL PROVIDER NETWORK (MPN) REQUIREMENTS.

1. Proposer shall conform to all the Core Requirements above, as well as the following MPN Requirements.
2. Proposer shall submit a list of physicians who will be providing Industrial Medical Services to the City. The following information shall be submitted electronically (i.e., as an Excel spreadsheet, not as a PDF) utilizing the template shown in Attachment B. Information includes: (1) Physician Name, (2) Specialty, (3) Physical Street Address, (4) City, (5) State, (6) Zip Code, (7) Any MPN Medical Group Affiliations, and (8) Assigned Provider Code. If a physician falls under more than one provider code, the physician shall be listed separately for each applicable provider code.

The following are the provider codes to be used: Primary Treating Physician (PTP), Orthopedic Medicine (ORTHO), Chiropractic (DC), Occupational medicine (OCCM), Acupuncture Medicine (LAC), Psychology (PSYCH), Pain Specialty Medicine (PM), Psychiatry, (PSY), Neurosurgery

(NSG), Family Medicine (GP), Neurology (NEURO), Internal Medicine (IM), Physical Medicine and Rehabilitation (PMR), and Podiatry (DPM).

If a provider's specialty does not fall under one of the above, then the specialty shall be designated as Miscellaneous, and the code used shall be (MISC).

By submission of its provider listing, Proposer is affirming that all of the physicians listed have been informed that the Medical Treatment Utilization Schedule ("MTUS") is presumptively correct on the issue of the extent and scope of medical treatment and diagnostic services and have valid and current licenses to practice medicine and their identified specialties in the State of California.

3. By submission of a response to this RFP, Proposer understands and agrees that the City retains the right of refusal or removal of any physician on the list at the City's sole discretion.

4. Proposer must have primary treating physicians and a hospital for emergency health care services, or if separate from such hospital, a medical provider of all emergency health care services.

5. Proposer shall submit ancillary service provider information in electronic (i.e., as an Excel spreadsheet, not as a PDF) format utilizing the template in Attachment C. Proposer shall complete the information in Attachment C in full including:

- 5.1 Ancillary Service Provider,
- 5.2 Specialty or Type of Service,
- 5.3 Physical Address,
- 5.4 City,
- 5.5 State,
- 5.6 Zip Code.
- 5.7 License number or certification to practice
- 5.8 Tax Identification Number (TIN)

By submission of this ancillary service information on Attachment C, Proposer is confirming that they are legally permitted to offer the required medical goods/services and that an existing contractual agreement exists between the Proposer and each listed ancillary service provider that will provide services for the City's MPN (Medical Provider Network).

6. Proposer shall comply with California Code of Regulations 9767.5.1, which requires that Medical Groups have signed physician acknowledgements for all providers participating in the MPN. This requirement may be met for employees or partners of the medical group with one acknowledgement signed by an authorized agent. For physicians contracted outside of Proposer's medical group, individual acknowledgements shall be maintained by Proposer and available for inspection upon City's request.

7. Proposer understands and agrees that a City employee may select any physician within the MPN for treatment.

8. Proposer shall not discontinue treatment or refuse treatment (of an existing patient of providers) to a City employee unless first discussed with, and approved by, the Workers' Compensation Program Manager. Approval will be based on reasoning and reviewed on a case-by-case basis.

9. It is a requirement that provider have telemedicine services and options for seeing patients remotely.

10. Proposer shall ensure that their physicians shall only treat or evaluate City employees at authorized MPN locations listed on the MPN website for all in person appointments.

11. Proposer shall refer City employees to physical therapists within the City's MPN, when possible. For first responders, Proposer shall agree to refer sworn police and fire patients to physical therapy facilities designated in first responder wellness contract in place with the City of San Diego Police Department and the City of San Diego Fire-Rescue Department.

12. For non-emergency specialist services, Proposer shall ensure that an appointment is available with an appropriate specialist within twenty (20) business days from date of request by doctor, employee, and/or the City. If such an appointment is not available within 20 business days, Proposer agrees to refer injured worker to another appropriate specialist within the MPN who is available within that timeframe.

13. Proposer and all subcontractors shall ensure all providers utilize the State mandated Request for Authorization (RFA) form for request of any treatment. RFA forms shall not be required for specialty referrals.

14. Proposer and all subcontractors must secure City's authorization prior to any referral to a specialist. Whenever possible, specialty referrals shall be made within the MPN.

15. Should the City contract with multiple Proposers for its MPN, Proposers shall agree to cooperate with one another and assist City employees with transitioning from one group to another when an employee elects to transfer care within the MPN.

16. Should an injured City employee elect to pursue the Second and Third opinion process described in 8 Cal. Code Reg. 9767.7, Proposer shall ensure that a copy of the written report shall be served on the employee, the City's Claim Representative, and the treating physician within 20 days of the date of the appointment or receipt of the diagnostic tests, whichever is later.

17. Proposer shall provide an affirmation that the physician compensation is not structured in order to achieve the goal of reducing, delaying, or denying medical treatment or restricting access to medical treatment.

18. For the duration of the Contract, Proposer shall appoint and maintain a Liaison, well-versed in California Worker Compensation laws, rules, and regulation, who shall:

18.1 Respond to all inquiries by City Staff within 24 hours. Provider shall have a mutually agreeable escalation process for non-responsiveness and unresolved items.

18.2 Be the point person to help resolve issues that may arise with the City's MPN, and treatment thereof and therefore must have knowledge of California Workers' Compensation laws and regulations.

18.3 Assist with scheduling and coordinating Specialty appointments, as needed.

18.4 Within 14 days of change, submit a City "MPN Physician" form (Attachment D) to the City's designated MPN coordinator when a physician is no longer contracted with Proposer or when any physician change's locations.

18.5 Submit a City "MPN Physician" form to the City's designated MPN coordinator when a new physician is being considered for occupational medical services within their network or as a contracted specialty provider.

18.6 Once monthly, compare the City's online listing of designated MPN physicians to Proposer's list of active physicians for any inconsistencies. Liaison shall confirm accuracy via email to the City's MPN Coordinator.

19. For the duration of the Contract, Proposer shall appoint and maintain a Specialty Care Coordinator who shall:

19.1 Schedule and facilitate specialty care appointments.

19.2 Assist City claim staff in the coordination of specialty care appointments.

20. Proposer and all subcontractors shall refrain from sending any form of mail to City employees advertising their availability on the MPN and shall not independently market City Departments.

F. DOCUMENTATION AND REPORTS. Proposer shall accurately maintain, store, and retrieve employee medical records during the period of this contract in accordance with all applicable laws and regulations. All documentation and reports shall be as required by law.

G. QUALIFICATIONS AND EXPERIENCE.

1. Proposer shall provide a California Physician's Assistant (PA) License for each Physician Assistant who will provide medical care to City Employees.

2. Proposer shall agree to provide, when requested by the City, the written guidelines, or protocols for the medical tasks the Physician Assistant is allowed to perform, and the name of the physician assigned to supervise the job performance of the Physician Assistant.

3. Proposer shall employ physicians and administrative staff who are conversant and knowledgeable in California Workers' Compensation laws and regulations and be able to verbally answer City Claim Staff questions with no additional cost to the City.

4. Proposer must include the names and qualifications of all employees who will be involved in providing audiometric and respiratory fitness examinations. The Employees' experience in providing these or other similar services must also be included in a statement of qualifications.

H. **REFERENCES.** Past performance will be verified by references demonstrating Proposers quality of the product or service, timeliness of performance, cost control, business practices, customer satisfaction and past performance of key personnel. References should demonstrate work of comparable size and complexity. References alternately may be used in determining responsibility of Proposer.

Proposer must supply three (3) references for Industrial Medicine and three (3) references for Safety and Preventive services including Respiratory and Audiometric examinations. References are to be provided as part of the Contractor Standards Pledge of Compliance form (attach additional pages to the Contractor Standards Pledge of Compliance, as needed).

I. **TECHINICAL REPRESENTATIVE.** The Technical Representative for this Contract is identified in the notice of award and is responsible for overseeing and monitoring this Contract.

J. **PRICING SUBMITTAL.** Proposers shall submit their proposal for pricing on the following City's Price Proposal pages. Using the enclosed Price Proposal pages will help ensure consistency in the price evaluation. The City's Price Proposal pages are to be completed in full for Sections 1-4. and shall be incorporated herein. Failure to complete the City's Price Proposal pages in full for Sections 1-4 shall be cause for proposal to be rejected as non-responsive. Any deviations from the Price Proposal pages shall be considered non-responsive and unacceptable.

Proposers may provide attachment worksheets, which include a breakdown of pricing and rationale used in their determination. However, price evaluation will be based on prices entered on the City's Price Proposal pages only. Blanks on the price proposal pages will be interpreted as zero (0), and no price will be allowed.

2.8 Additional Information as required Exhibit B, Section J

C 5. Requirements Overview - Price Proposal pages:

CITY'S ESTIMATED NEED. Any variation from the annual estimated quantities that follow shall not entitle the Contractor to an adjustment in the unit price or any additional compensation.

The calculation of Evaluation Criteria points allotted for Price (See Exhibit A, Section B, Pricing) will be based on Proposer's submittal for Sections 1 through 4 listed below.

SECTION 1: AUDIOMETRIC SERVICES (See Exhibit B, Section C (5.4).

Item No.	Estimated Annual Quantity	Description	Price Per Each	Extension (Estimated Annual Quantity x Price per Each)
1.	800	Audiometric Examination	\$69.00 /EA	\$55,200/YR

TOTAL SECTION 1: \$55,200/YR

SECTION 2: RESPIRATORY MEDICAL SERVICES – Protocol (See Exhibit B, Section C (5.5).

Item No.	Estimated Annual Quantity	Description	Price Per Each	Extension (Estimated Annual Quantity x Price per Each)
1.	150	Occupational History	\$19.00 /EA	\$ 2,850/YR
2.	150	Medical History	\$19.00 /EA	\$ 2,850/YR
3.	150	Physical Examination	\$58.00 /EA	\$ 8,700/YR
4.	150	Pulmonary Function Test	\$46.00 /EA	\$ 6,900/YR

TOTAL SECTION 2: \$21,300/YR

SECTION 3: RESPIRATORY MEDICAL SERVICES – Protocol – At Physician

Discretion Only (See Exhibit B, Section C (5.5).

Item No.	Estimated Annual Quantity	Description	Price Per Each	Extension (Estimated Annual Quantity x Price per Each)
1.	150	Chest X-Ray	\$49.00 /EA	\$7,350/YR
2.	150	EKG	\$24.00 /EA	\$3,600/YR
3.	150	Stress Test	\$120.00 /EA	\$18,000 /YR

TOTAL SECTION 3: \$ 28,950/YR

SECTION 4: HEALTH AND SAFETY TRAINING – Physician and Non-Physician Fee for Consulting/Training for Safety/Prevention Services beyond 25 hours annually (See Exhibit B, Section C (5.6).

Item No.	Estimated Annual Quantity	Description	Price Per Each	Extension (Estimated Annual Quantity x Price per Each)
1.	30	Physician	\$ 250.00 /EA	\$7,500/YR
2.	30	Non-Physician	\$175.00 /EA	\$5,250/YR

TOTAL SECTION 4: \$12,750/YR

SECTION 5: INPATIENT AND OUTPATIENT HOSPITAL SERVICES THAT ARE NOT COVERED ON THE STATE OF CALIFORNIA FEE SCHEDULE INCLUDING ACUTE, SUB-ACUTE REHAB AND PSYCHIATRIC WILL BE PAID AT 75% OF BILLED CHARGES*.

* Billed charges shall not exceed the facilities Usual and Customary rates. All non-emergency services must be pre-approved by the City of San Diego.

IN ACCORDANCE WITH CALIFORNIA CODE OF REGULATIONS (CCR) TITLE 8 SECTION §9789.10 THOROUGH §9792.1 ALL OCCUPATIONAL MEDICINE SERVICES, OUTPATIENT OR AMBULATORY SURGERY CENTERS AND INPATIENT

HOSPITALIZATIONS THAT ARE SUBJECT AND COVERED BY THE OFFICIAL MEDICAL FEE SCHEDULE (OMFS) SHALL BE PAID AT OMFS RATES LESS ANY APPLICABLE PPO REDUCTIONS FOR ANY PPO NETWORKS FOR WHICH PROVIDER IS A MEMBER.

SECTION 6: OPTIONAL SERVICES – Proposer is not required to offer these services. However, if the services are offered, City may elect to include them in Contract at time of award at the pricing bid. This section will not be included in the calculation of Evaluation Criteria points for Price, see Exhibit A, Section B, “Pricing”.

Item No.	Estimated Annual Quantity	Description	Price Per Each	Extension (Estimated Annual Quantity x Price per Each)
1.	150	Hepatitis A (HEPA Vaccine	\$90.00 /EA	\$ 13,500/YR
2.	150	Heavy Metals Test	\$34.00/EA	\$5,100/YR
3.	150	Cancer Screening	\$0.00 /EA	\$ 0.00/YR

TOTAL SECTION 6: \$18,600/YR

EXHIBIT C



THE CITY OF SAN DIEGO
GENERAL CONTRACT TERMS AND PROVISIONS
APPLICABLE TO GOODS, SERVICES, AND CONSULTANT CONTRACTS

ARTICLE I

SCOPE AND TERM OF CONTRACT

1.1 Scope of Contract. The scope of contract between the City and a provider of goods and/or services (Contractor) is described in the Contract Documents. The Contract Documents are comprised of the Request for Proposal, Invitation to Bid, or other solicitation document (Solicitation); the successful bid or proposal; the letter awarding the contract to Contractor; the City's written acceptance of exceptions or clarifications to the Solicitation, if any; and these General Contract Terms and Provisions.

1.2 Effective Date. A contract between the City and Contractor (Contract) is effective on the last date that the contract is signed by the parties and approved by the City Attorney in accordance with Charter section 40. Unless otherwise terminated, this Contract is effective until it is completed or as otherwise agreed upon in writing by the parties, whichever is the earliest. A Contract term cannot exceed five (5) years unless approved by the City Council by ordinance.

1.3 Contract Extension. The City may, in its sole discretion, unilaterally exercise an option to extend the Contract as described in the Contract Documents. In addition, the City may, in its sole discretion, unilaterally extend the Contract on a month-to-month basis following contract expiration if authorized under Charter section 99 and the Contract Documents. Contractor shall not increase its pricing in excess of the percentage increase described in the Contract.

ARTICLE II

CONTRACT ADMINISTRATOR

2.1 Contract Administrator. The Purchasing Agent or designee is the Contract Administrator for purposes of this Contract, and has the responsibilities described in this Contract, in the San Diego Charter, and in Chapter 2, Article 2, Divisions 5, 30, and 32.

2.1.1 Contractor Performance Evaluations. The Contract Administrator will evaluate Contractor's performance as often as the Contract Administrator deems necessary throughout the term of the contract. This evaluation will be based on criteria including the quality of goods or services, the timeliness of performance, and adherence to applicable laws, including prevailing wage and living wage. City will provide Contractors who receive an unsatisfactory rating with a copy of the evaluation and an opportunity to respond. City may consider final evaluations, including Contractor's response, in evaluating future proposals and bids for contract award.

2.2 Notices. Unless otherwise specified, in all cases where written notice is required under this Contract, service shall be deemed sufficient if the notice is personally delivered or deposited in the United States mail, with first class postage paid, attention to the Purchasing Agent. Proper notice is effective on the date of personal delivery or five (5) days after deposit in a United States postal mailbox unless provided otherwise in the Contract. Notices to the City shall be sent to:

Purchasing Agent
City of San Diego, Purchasing and Contracting Division
1200 3rd Avenue, Suite 200
San Diego, CA 92101-4195

ARTICLE III COMPENSATION

3.1 Manner of Payment. Contractor will be paid monthly, in arrears, for goods and/or services provided in accordance with the terms and provisions specified in the Contract.

3.2 Invoices.

3.2.1 Invoice Detail. Contractor's invoice must be on Contractor's stationary with Contractor's name, address, and remittance address if different. Contractor's invoice must have a date, an invoice number, a purchase order number, a description of the goods or services provided, and an amount due.

3.2.2 Service Contracts. Contractor must submit invoices for services to City by the 10th of the month following the month in which Contractor provided services. Invoices must include the address of the location where services were performed and the dates in which services were provided.

3.2.3 Goods Contracts. Contractor must submit invoices for goods to City within seven days of the shipment. Invoices must describe the goods provided.

3.2.4 Parts Contracts. Contractor must submit invoices for parts to City within seven calendar (7) days of the date the parts are shipped. Invoices must include the manufacturer of the part, manufacturer's published list price, percentage discount applied in accordance with Pricing Page(s), the net price to City, and an item description, quantity, and extension.

3.2.5 Extraordinary Work. City will not pay Contractor for extraordinary work unless Contractor receives prior written authorization from the Contract Administrator. Failure to do so will result in payment being withheld for services. If approved, Contractor will include an invoice that describes the work performed and the location where the work was performed, and a copy of the Contract Administrator's written authorization.

3.2.6 Reporting Requirements. Contractor must submit the following reports using the City's web-based contract compliance portal. Incomplete and/or delinquent reports may cause payment delays, non-payment of invoice, or both. For questions, please view the City's online tutorials on how to utilize the City's web-based contract compliance portal.

3.2.6.1 Monthly Employment Utilization Reports. Contractor and Contractor's subcontractors and suppliers must submit Monthly Employment Utilization Reports by the fifth (5th) day of the subsequent month.

3.2.6.2 Monthly Invoicing and Payments. Contractor and Contractor's subcontractors and suppliers must submit Monthly Invoicing and Payment Reports by the fifth (5th) day of the subsequent month.

3.3 Annual Appropriation of Funds. Contractor acknowledges that the Contract term may extend over multiple City fiscal years, and that work and compensation under this Contract is contingent on the City Council appropriating funding for and authorizing such work and compensation for those fiscal years. This Contract may be terminated at the end of the fiscal year for which sufficient funding is not appropriated and authorized. City is not obligated to pay Contractor for any amounts not duly appropriated and authorized by City Council.

3.4 Price Adjustments. Based on Contractor's written request and justification, the City may approve an increase in unit prices on Contractor's pricing pages consistent with the amount requested in the justification in an amount not to exceed the increase in the Consumer Price Index, San Diego Area, for All Urban Customers (CPI-U) as published by the Bureau of Labor Statistics, or 5.0%, whichever is less, during the preceding one year term. If the CPI-U is a negative number, then the unit prices shall not be adjusted for that option year (the unit prices will not be decreased). A negative CPI-U shall be counted against any subsequent increases in the CPI-U when calculating the unit prices for later option years. Contractor must provide such written request and justification no less than sixty days before the date in which City may exercise the option to renew the contract, or sixty days before the anniversary date of the Contract. Justification in support of the written request must include a description of the basis for the adjustment, the proposed effective date and reasons for said date, and the amount of the adjustment requested with documentation to support the requested change (e.g. CPI-U or 5.0%, whichever is less). City's approval of this request must be in writing.

ARTICLE IV SUSPENSION AND TERMINATION

4.1 City's Right to Suspend for Convenience. City may suspend all or any portion of Contractor's performance under this Contract at its sole option and for its convenience for a reasonable period of time not to exceed six (6) months. City must first give ten (10) days' written notice to Contractor of such suspension. City will pay to Contractor a sum equivalent to the reasonable value of the goods and/or services satisfactorily provided up to the date of suspension. City may rescind the suspension prior to or at six (6) months by providing Contractor with written notice of the rescission, at which time Contractor would be required to resume performance in compliance with the terms and provisions of this Contract. Contractor will be entitled to an extension of time to complete performance under the Contract equal to the length of the suspension unless otherwise agreed to in writing by the Parties.

4.2 City's Right to Terminate for Convenience. City may, at its sole option and for its convenience, terminate all or any portion of this Contract by giving thirty (30) days' written notice of such termination to Contractor. The termination of the Contract shall be effective upon receipt of the notice by Contractor. After termination of all or any portion of the Contract, Contractor shall: (1) immediately discontinue all affected performance (unless the notice directs otherwise); and (2) complete any and all additional work necessary for the orderly filing of

documents and closing of Contractor's affected performance under the Contract. After filing of documents and completion of performance, Contractor shall deliver to City all data, drawings, specifications, reports, estimates, summaries, and such other information and materials created or received by Contractor in performing this Contract, whether completed or in process. By accepting payment for completion, filing, and delivering documents as called for in this section, Contractor discharges City of all of City's payment obligations and liabilities under this Contract with regard to the affected performance.

4.3 City's Right to Terminate for Default. Contractor's failure to satisfactorily perform any obligation required by this Contract constitutes a default. Examples of default include a determination by City that Contractor has: (1) failed to deliver goods and/or perform the services of the required quality or within the time specified; (2) failed to perform any of the obligations of this Contract; and (3) failed to make sufficient progress in performance which may jeopardize full performance.

4.3.1 If Contractor fails to satisfactorily cure a default within ten (10) calendar days of receiving written notice from City specifying the nature of the default, City may immediately cancel and/or terminate this Contract, and terminate each and every right of Contractor, and any person claiming any rights by or through Contractor under this Contract.

4.3.2 If City terminates this Contract, in whole or in part, City may procure, upon such terms and in such manner as the Purchasing Agent may deem appropriate, equivalent goods or services and Contractor shall be liable to City for any excess costs. Contractor shall also continue performance to the extent not terminated.

4.4 Termination for Bankruptcy or Assignment for the Benefit of Creditors. If Contractor files a voluntary petition in bankruptcy, is adjudicated bankrupt, or makes a general assignment for the benefit of creditors, the City may at its option and without further notice to, or demand upon Contractor, terminate this Contract, and terminate each and every right of Contractor, and any person claiming rights by and through Contractor under this Contract.

4.5 Contractor's Right to Payment Following Contract Termination.

4.5.1 Termination for Convenience. If the termination is for the convenience of City an equitable adjustment in the Contract price shall be made. No amount shall be allowed for anticipated profit on unperformed services, and no amount shall be paid for an as needed contract beyond the Contract termination date.

4.5.2 Termination for Default. If, after City gives notice of termination for failure to fulfill Contract obligations to Contractor, it is determined that Contractor had not so failed, the termination shall be deemed to have been effected for the convenience of City. In such event, adjustment in the Contract price shall be made as provided in Section 4.3.2. City's rights and remedies are in addition to any other rights and remedies provided by law or under this Contract.

4.6 Remedies Cumulative. City's remedies are cumulative and are not intended to be exclusive of any other remedies or means of redress to which City may be lawfully entitled in case of any breach or threatened breach of any provision of this Contract.

ARTICLE V ADDITIONAL CONTRACTOR OBLIGATIONS

5.1 Inspection and Acceptance. The City will inspect and accept goods provided under this Contract at the shipment destination unless specified otherwise. Inspection will be made and acceptance will be determined by the City department shown in the shipping address of the Purchase Order or other duly authorized representative of City.

5.2 Responsibility for Lost or Damaged Shipments. Contractor bears the risk of loss or damage to goods prior to the time of their receipt and acceptance by City. City has no obligation to accept damaged shipments and reserves the right to return damaged goods, at Contractor's sole expense, even if the damage was not apparent or discovered until after receipt.

5.3 Responsibility for Damages. Contractor is responsible for all damage that occurs as a result of Contractor's fault or negligence or that of its' employees, agents, or representatives in connection with the performance of this Contract. Contractor shall immediately report any such damage to people and/or property to the Contract Administrator.

5.4 Delivery. Delivery shall be made on the delivery day specified in the Contract Documents. The City, in its sole discretion, may extend the time for delivery. The City may order, in writing, the suspension, delay or interruption of delivery of goods and/or services.

5.5 Delay. Unless otherwise specified herein, time is of the essence for each and every provision of the Contract. Contractor must immediately notify City in writing if there is, or it is anticipated that there will be, a delay in performance. The written notice must explain the cause for the delay and provide a reasonable estimate of the length of the delay. City may terminate this Contract as provided herein if City, in its sole discretion, determines the delay is material.

5.5.1 If a delay in performance is caused by any unforeseen event(s) beyond the control of the parties, City may allow Contractor to a reasonable extension of time to complete performance, but Contractor will not be entitled to damages or additional compensation. Any such extension of time must be approved in writing by City. The following conditions may constitute such a delay: war; changes in law or government regulation; labor disputes; strikes; fires, floods, adverse weather or other similar condition of the elements necessitating cessation of the performance; inability to obtain materials, equipment or labor; or other specific reasons agreed to between City and Contractor. This provision does not apply to a delay caused by Contractor's acts or omissions. Contractor is not entitled to an extension of time to perform if a delay is caused by Contractor's inability to obtain materials, equipment, or labor unless City has received, in a timely manner, documentary proof satisfactory to City of Contractor's inability to obtain materials, equipment, or labor, in which case City's approval must be in writing.

5.6 Restrictions and Regulations Requiring Contract Modification. Contractor shall immediately notify City in writing of any regulations or restrictions that may or will require Contractor to alter the material, quality, workmanship, or performance of the goods and/or services to be provided. City reserves the right to accept any such alteration, including any resulting reasonable price adjustments, or to cancel the Contract at no expense to the City.

5.7 Warranties. All goods and/or services provided under the Contract must be warranted by Contractor or manufacturer for at least twelve (12) months after acceptance by City, except automotive equipment. Automotive equipment must be warranted for a minimum of 12,000 miles or 12 months, whichever occurs first, unless otherwise stated in the Contract. Contractor is responsible to City for all warranty service, parts, and labor. Contractor is required to ensure that warranty work is performed at a facility acceptable to City and that services, parts, and labor are available and provided to meet City's schedules and deadlines. Contractor may establish a warranty service contract with an agency satisfactory to City instead of performing the warranty service itself. If Contractor is not an authorized service center and causes any damage to equipment being serviced, which results in the existing warranty being voided, Contractor will be liable for all costs of repairs to the equipment, or the costs of replacing the equipment with new equipment that meets City's operational needs.

5.8 Industry Standards. Contractor shall provide goods and/or services acceptable to City in strict conformance with the Contract. Contractor shall also provide goods and/or services in accordance with the standards customarily adhered to by an experienced and competent provider of the goods and/or services called for under this Contract using the degree of care and skill ordinarily exercised by reputable providers of such goods and/or services. Where approval by City, the Mayor, or other representative of City is required, it is understood to be general approval only and does not relieve Contractor of responsibility for complying with all applicable laws, codes, policies, regulations, and good business practices.

5.9 Records Retention and Examination. Contractor shall retain, protect, and maintain in an accessible location all records and documents, including paper, electronic, and computer records, relating to this Contract for five (5) years after receipt of final payment by City under this Contract. Contractor shall make all such records and documents available for inspection, copying, or other reproduction, and auditing by authorized representatives of City, including the Purchasing Agent or designee. Contractor shall make available all requested data and records at reasonable locations within City or County of San Diego at any time during normal business hours, and as often as City deems necessary. If records are not made available within the City or County of San Diego, Contractor shall pay City's travel costs to the location where the records are maintained and shall pay for all related travel expenses. Failure to make requested records available for inspection, copying, or other reproduction, or auditing by the date requested may result in termination of the Contract. Contractor must include this provision in all subcontracts made in connection with this Contract.

5.9.1 Contractor shall maintain records of all subcontracts entered into with all firms, all project invoices received from Subcontractors and Suppliers, all purchases of materials and services from Suppliers, and all joint venture participation. Records shall show name, telephone number including area code, and business address of each Subcontractor and Supplier, and joint venture partner, and the total amount actually paid to each firm. Project relevant records, regardless of tier, may be periodically reviewed by the City.

5.10 Quality Assurance Meetings. Upon City's request, Contractor shall schedule one or more quality assurance meetings with City's Contract Administrator to discuss Contractor's performance. If requested, Contractor shall schedule the first quality assurance meeting no later than eight (8) weeks from the date of commencement of work under the Contract. At the quality assurance meeting(s), City's Contract Administrator will provide Contractor with feedback, will note any deficiencies in Contract performance, and provide Contractor with an opportunity to address and correct such deficiencies. The total number of quality assurance meetings that may be required by City will depend upon Contractor's performance.

5.11 Duty to Cooperate with Auditor. The City Auditor may, in his sole discretion, at no cost to the City, and for purposes of performing his responsibilities under Charter section 39.2, review Contractor's records to confirm contract compliance. Contractor shall make reasonable efforts to cooperate with Auditor's requests.

5.12 Safety Data Sheets. If specified by City in the solicitation or otherwise required by this Contract, Contractor must send with each shipment one (1) copy of the Safety Data Sheet (SDS) for each item shipped. Failure to comply with this procedure will be cause for immediate termination of the Contract for violation of safety procedures.

5.13 Project Personnel. Except as formally approved by the City, the key personnel identified in Contractor's bid or proposal shall be the individuals who will actually complete the work. Changes in staffing must be reported in writing and approved by the City.

5.13.1 Criminal Background Certification. Contractor certifies that all employees working on this Contract have had a criminal background check and that said employees are clear of any sexual and drug related convictions. Contractor further certifies that all employees hired by Contractor or a subcontractor shall be free from any felony convictions.

5.13.2 Photo Identification Badge. Contractor shall provide a company photo identification badge to any individual assigned by Contractor or subcontractor to perform services or deliver goods on City premises. Such badge must be worn at all times while on City premises. City reserves the right to require Contractor to pay fingerprinting fees for personnel assigned to work in sensitive areas. All employees shall turn in their photo identification badges to Contractor upon completion of services and prior to final payment of invoice.

5.14 Standards of Conduct. Contractor is responsible for maintaining standards of employee competence, conduct, courtesy, appearance, honesty, and integrity satisfactory to the City.

5.14.1 Supervision. Contractor shall provide adequate and competent supervision at all times during the Contract term. Contractor shall be readily available to meet with the City. Contractor shall provide the telephone numbers where its representative(s) can be reached.

5.14.2 City Premises. Contractor's employees and agents shall comply with all City rules and regulations while on City premises.

5.14.3 Removal of Employees. City may request Contractor immediately remove from assignment to the City any employee found unfit to perform duties at the City. Contractor shall comply with all such requests.

5.15 Licenses and Permits. Contractor shall, without additional expense to the City, be responsible for obtaining any necessary licenses, permits, certifications, accreditations, fees and approvals for complying with any federal, state, county, municipal, and other laws, codes, and regulations applicable to Contract performance. This includes, but is not limited to, any laws or regulations requiring the use of licensed contractors to perform parts of the work.

5.16 Contractor and Subcontractor Registration Requirements. Prior to the award of the Contract or Task Order, Contractor and Contractor's subcontractors and suppliers must register with the City's web-based vendor registration and bid management system. The City may not award the Contract until registration of all subcontractors and suppliers is complete. In the event this requirement is not met within the time frame specified by the City, the City reserves the right to rescind the Contract award and to make the award to the next responsive and responsible proposer of bidder.

ARTICLE VI INTELLECTUAL PROPERTY RIGHTS

6.1 Rights in Data. If, in connection with the services performed under this Contract, Contractor or its employees, agents, or subcontractors, create artwork, audio recordings, blueprints, designs, diagrams, documentation, photographs, plans, reports, software, source code, specifications, surveys, system designs, video recordings, or any other original works of authorship, whether written or readable by machine (Deliverable Materials), all rights of Contractor or its subcontractors in the Deliverable Materials, including, but not limited to publication, and registration of copyrights, and trademarks in the Deliverable Materials, are the sole property of City. Contractor, including its employees, agents, and subcontractors, may not use any Deliverable Material for purposes unrelated to Contractor's work on behalf of the City without prior written consent of City. Contractor may not publish or reproduce any Deliverable Materials, for purposes unrelated to Contractor's work on behalf of the City, without the prior written consent of the City.

6.2 Intellectual Property Rights Assignment. For no additional compensation, Contractor hereby assigns to City all of Contractor's rights, title, and interest in and to the content of the Deliverable Materials created by Contractor or its employees, agents, or subcontractors, including copyrights, in connection with the services performed under this Contract. Contractor

shall promptly execute and deliver, and shall cause its employees, agents, and subcontractors to promptly execute and deliver, upon request by the City or any of its successors or assigns at any time and without further compensation of any kind, any power of attorney, assignment, application for copyright, patent, trademark or other intellectual property right protection, or other papers or instruments which may be necessary or desirable to fully secure, perfect or otherwise protect to or for the City, its successors and assigns, all right, title and interest in and to the content of the Deliverable Materials. Contractor also shall cooperate and assist in the prosecution of any action or opposition proceeding involving such intellectual property rights and any adjudication of those rights.

6.3 Contractor Works. Contractor Works means tangible and intangible information and material that: (a) had already been conceived, invented, created, developed or acquired by Contractor prior to the effective date of this Contract; or (b) were conceived, invented, created, or developed by Contractor after the effective date of this Contract, but only to the extent such information and material do not constitute part or all of the Deliverable Materials called for in this Contract. All Contractor Works, and all modifications or derivatives of such Contractor Works, including all intellectual property rights in or pertaining to the same, shall be owned solely and exclusively by Contractor.

6.4 Subcontracting. In the event that Contractor utilizes a subcontractor(s) for any portion of the work that comprises the whole or part of the specified Deliverable Materials to the City, the agreement between Contractor and the subcontractor shall include a statement that identifies the Deliverable Materials as a “works for hire” as described in the United States Copyright Act of 1976, as amended, and that all intellectual property rights in the Deliverable Materials, whether arising in copyright, trademark, service mark or other forms of intellectual property rights, belong to and shall vest solely with the City. Further, the agreement between Contractor and its subcontractor shall require that the subcontractor, if necessary, shall grant, transfer, sell and assign, free of charge, exclusively to City, all titles, rights and interests in and to the Deliverable Materials, including all copyrights, trademarks and other intellectual property rights. City shall have the right to review any such agreement for compliance with this provision.

6.5 Intellectual Property Warranty and Indemnification. Contractor represents and warrants that any materials or deliverables, including all Deliverable Materials, provided under this Contract are either original, or not encumbered, and do not infringe upon the copyright, trademark, patent or other intellectual property rights of any third party, or are in the public domain. If Deliverable Materials provided hereunder become the subject of a claim, suit or allegation of copyright, trademark or patent infringement, City shall have the right, in its sole discretion, to require Contractor to produce, at Contractor’s own expense, new non-infringing materials, deliverables or works as a means of remedying any claim of infringement in addition to any other remedy available to the City under law or equity. Contractor further agrees to indemnify, defend, and hold harmless the City, its officers, employees and agents from and against any and all claims, actions, costs, judgments or damages, of any type, alleging or threatening that any Deliverable Materials, supplies, equipment, services or works provided under this contract infringe the copyright, trademark, patent or other intellectual property or proprietary rights of any third party (Third Party Claim of Infringement). If a Third Party Claim

of Infringement is threatened or made before Contractor receives payment under this Contract, City shall be entitled, upon written notice to Contractor, to withhold some or all of such payment.

6.6 Software Licensing. Contractor represents and warrants that the software, if any, as delivered to City, does not contain any program code, virus, worm, trap door, back door, time or clock that would erase data or programming or otherwise cause the software to become inoperable, inaccessible, or incapable of being used in accordance with its user manuals, either automatically, upon the occurrence of licensor-selected conditions or manually on command. Contractor further represents and warrants that all third party software, delivered to City or used by Contractor in the performance of the Contract, is fully licensed by the appropriate licensor.

6.7 Publication. Contractor may not publish or reproduce any Deliverable Materials, for purposes unrelated to Contractor's work on behalf of the City without prior written consent from the City.

6.8 Royalties, Licenses, and Patents. Unless otherwise specified, Contractor shall pay all royalties, license, and patent fees associated with the goods that are the subject of this solicitation. Contractor warrants that the goods, materials, supplies, and equipment to be supplied do not infringe upon any patent, trademark, or copyright, and further agrees to defend any and all suits, actions and claims for infringement that are brought against the City, and to defend, indemnify and hold harmless the City, its elected officials, officers, and employees from all liability, loss and damages, whether general, exemplary or punitive, suffered as a result of any actual or claimed infringement asserted against the City, Contractor, or those furnishing goods, materials, supplies, or equipment to Contractor under the Contract.

ARTICLE VII INDEMNIFICATION AND INSURANCE

7.1 Indemnification. To the fullest extent permitted by law, Contractor shall defend (with legal counsel reasonably acceptable to City), indemnify, protect, and hold harmless City and its elected officials, officers, employees, agents, and representatives (Indemnified Parties) from and against any and all claims, losses, costs, damages, injuries (including, without limitation, injury to or death of an employee of Contractor or its subcontractors), expense, and liability of every kind, nature and description (including, without limitation, incidental and consequential damages, court costs, and litigation expenses and fees of expert consultants or expert witnesses incurred in connection therewith and costs of investigation) that arise out of, pertain to, or relate to, directly or indirectly, in whole or in part, any goods provided or performance of services under this Contract by Contractor, any subcontractor, anyone directly or indirectly employed by either of them, or anyone that either of them control. Contractor's duty to defend, indemnify, protect and hold harmless shall not include any claims or liabilities arising from the sole negligence or willful misconduct of the Indemnified Parties.

7.2 Insurance. Contractor shall procure and maintain for the duration of the contract insurance against claims for injuries to persons or damages to property which may arise from or

in connection with the performance of the work hereunder and the results of that work by Contractor, his agents, representatives, employees or subcontractors.

Contractor shall provide, at a minimum, the following:

7.2.1 Commercial General Liability. Insurance Services Office Form CG 00 01 covering CGL on an “occurrence” basis, including products and completed operations, property damage, bodily injury, and personal and advertising injury with limits no less than \$1,000,000 per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this project/location (ISO CG 25 03 or 25 04) or the general aggregate limit shall be twice the required occurrence limit.

7.2.2 Commercial Automobile Liability. Insurance Services Office Form Number CA 0001 covering Code 1 (any auto) or, if Contractor has no owned autos, Code 8 (hired) and 9 (non-owned), with limit no less than \$1,000,000 per accident for bodily injury and property damage.

7.2.3 Workers' Compensation. Insurance as required by the State of California, with Statutory Limits, and Employer's Liability Insurance with limit of no less than \$1,000,000 per accident for bodily injury or disease.

7.2.4 Professional Liability (Errors and Omissions). For consultant contracts, insurance appropriate to Consultant's profession, with limit no less than \$1,000,000 per occurrence or claim, \$2,000,000 aggregate.

If Contractor maintains broader coverage and/or higher limits than the minimums shown above, City requires and shall be entitled to the broader coverage and/or the higher limits maintained by Contractor. Any available insurance proceeds in excess of the specified minimum limits of insurance and coverage shall be available to City.

7.2.5 Other Insurance Provisions. The insurance policies are to contain, or be endorsed to contain, the following provisions:

7.2.5.1 Additional Insured Status. The City, its officers, officials, employees, and volunteers are to be covered as additional insureds on the CGL policy with respect to liability arising out of work or operations performed by or on behalf of Contractor including materials, parts, or equipment furnished in connection with such work or operations. General liability coverage can be provided in the form of an endorsement to Contractor's insurance (at least as broad as ISO Form CG 20 10 11 85 or if not available, through the addition of both CG 20 10, CG 20 26, CG 20 33, or CG 20 38; and CG 20 37 if a later edition is used).

7.2.5.2 Primary Coverage. For any claims related to this contract, Contractor's insurance coverage shall be primary coverage at least as broad as ISO CG 20 01 04 13 as respects the City, its officers, officials, employees, and volunteers. Any insurance or self-insurance maintained by City, its officers, officials, employees, or volunteers shall be excess of Contractor's insurance and shall not contribute with it.

7.2.5.3 Notice of Cancellation. Each insurance policy required above shall provide that coverage shall not be canceled, except with notice to City.

7.2.5.4 Waiver of Subrogation. Contractor hereby grants to City a waiver of any right to subrogation which the Workers' Compensation insurer of said Contractor may acquire against City by virtue of the payment of any loss under such insurance. Contractor agrees to obtain any endorsement that may be necessary to affect this waiver of subrogation, but this provision applies regardless of whether or not the City has received a waiver of subrogation endorsement from the insurer.

7.2.5.5 Claims Made Policies (applicable only to professional liability). The Retroactive Date must be shown, and must be before the date of the contract or the beginning of contract work. Insurance must be maintained and evidence of insurance must be provided for at least five (5) years after completion of the contract of work. If coverage is canceled or non-renewed, and not replaced with another claims-made policy form with a Retroactive Date prior to the contract effective date, Contractor must purchase "extended reporting" coverage for a minimum of five (5) years after completion of work.

7.3 Self Insured Retentions. Self-insured retentions must be declared to and approved by City. City may require Contractor to purchase coverage with a lower retention or provide proof of ability to pay losses and related investigations, claim administration, and defense expenses within the retention. The policy language shall provide, or be endorsed to provide, that the self-insured retention may be satisfied by either the named insured or City.

7.4 Acceptability of Insurers. Insurance is to be placed with insurers with a current A.M. Best's rating of no less than A-VI, unless otherwise acceptable to City.

City will accept insurance provided by non-admitted, "surplus lines" carriers only if the carrier is authorized to do business in the State of California and is included on the List of Approved Surplus Lines Insurers (LASLI list). All policies of insurance carried by non-admitted carriers are subject to all of the requirements for policies of insurance provided by admitted carriers described herein.

7.5 Verification of Coverage. Contractor shall furnish City with original certificates and amendatory endorsements or copies of the applicable policy language effecting coverage required by this clause. All certificates and endorsements are to be received and approved by City before work commences. However, failure to obtain the required documents prior to the work beginning shall not waive Contractor's obligation to provide them. City reserves the right to require complete, certified copies of all required insurance policies, including endorsements required by these specifications, at any time.

7.6 Special Risks or Circumstances. City reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances.

7.7 Additional Insurance. Contractor may obtain additional insurance not required by this Contract.

7.8 Excess Insurance. All policies providing excess coverage to City shall follow the form of the primary policy or policies including but not limited to all endorsements.

7.9 Subcontractors. Contractor shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Contractor shall ensure that City is an additional insured on insurance required from subcontractors. For CGL coverage, subcontractors shall provide coverage with a format at least as broad as the CG 20 38 04 13 endorsement.

ARTICLE VIII BONDS

8.1 Payment and Performance Bond. Prior to the execution of this Contract, City may require Contractor to post a payment and performance bond (Bond). The Bond shall guarantee Contractor's faithful performance of this Contract and assure payment to contractors, subcontractors, and to persons furnishing goods and/or services under this Contract.

8.1.1 Bond Amount. The Bond shall be in a sum equal to twenty-five percent (25%) of the Contract amount, unless otherwise stated in the Specifications. City may file a claim against the Bond if Contractor fails or refuses to fulfill the terms and provisions of the Contract.

8.1.2 Bond Term. The Bond shall remain in full force and effect at least until complete performance of this Contract and payment of all claims for materials and labor, at which time it will convert to a ten percent (10%) warranty bond, which shall remain in place until the end of the warranty periods set forth in this Contract. The Bond shall be renewed annually, at least sixty (60) days in advance of its expiration, and Contractor shall provide timely proof of annual renewal to City.

8.1.3 Bond Surety. The Bond must be furnished by a company authorized by the State of California Department of Insurance to transact surety business in the State of California and which has a current A.M. Best rating of at least "A-, VIII."

8.1.4 Non-Renewal or Cancellation. The Bond must provide that City and Contractor shall be provided with sixty (60) days' advance written notice in the event of non-renewal, cancellation, or material change to its terms. In the event of non-renewal, cancellation, or material change to the Bond terms, Contractor shall provide City with evidence of the new source of surety within twenty-one (21) calendar days after the date of the notice of non-renewal, cancellation, or material change. Failure to maintain the Bond, as required herein, in full force

and effect as required under this Contract, will be a material breach of the Contract subject to termination of the Contract.

8.2 Alternate Security. City may, at its sole discretion, accept alternate security in the form of an endorsed certificate of deposit, a money order, a certified check drawn on a solvent bank, or other security acceptable to the Purchasing Agent in an amount equal to the required Bond.

ARTICLE IX CITY-MANDATED CLAUSES AND REQUIREMENTS

9.1 Contractor Certification of Compliance. By signing this Contract, Contractor certifies that Contractor is aware of, and will comply with, these City-mandated clauses throughout the duration of the Contract.

9.1.1 Drug-Free Workplace Certification. Contractor shall comply with City's Drug-Free Workplace requirements set forth in Council Policy 100-17, which is incorporated into the Contract by this reference.

9.1.2 Contractor Certification for Americans with Disabilities Act (ADA) and State Access Laws and Regulations: Contractor shall comply with all accessibility requirements under the ADA and under Title 24 of the California Code of Regulations (Title 24). When a conflict exists between the ADA and Title 24, Contractor shall comply with the most restrictive requirement (i.e., that which provides the most access). Contractor also shall comply with the City's ADA Compliance/City Contractors requirements as set forth in Council Policy 100-04, which is incorporated into this Contract by reference. Contractor warrants and certifies compliance with all federal and state access laws and regulations and further certifies that any subcontract agreement for this contract contains language which indicates the subcontractor's agreement to abide by the provisions of the City's Council Policy and any applicable access laws and regulations.

9.1.3 Non-Discrimination Requirements.

9.1.3.1 Compliance with City's Equal Opportunity Contracting Program (EOCP). Contractor shall comply with City's EOCP Requirements. Contractor shall not discriminate against any employee or applicant for employment on any basis prohibited by law. Contractor shall provide equal opportunity in all employment practices. Prime Contractors shall ensure that their subcontractors comply with this program. Nothing in this Section shall be interpreted to hold a Prime Contractor liable for any discriminatory practice of its subcontractors.

9.1.3.2 Non-Discrimination Ordinance. Contractor shall not discriminate on the basis of race, gender, gender expression, gender identity, religion, national origin, ethnicity, sexual orientation, age, or disability in the solicitation, selection, hiring or treatment of subcontractors, vendors or suppliers. Contractor shall provide equal opportunity for subcontractors to participate in subcontracting opportunities. Contractor understands and agrees that violation of this clause shall be considered a material breach of the Contract and may result

in Contract termination, debarment, or other sanctions. Contractor shall ensure that this language is included in contracts between Contractor and any subcontractors, vendors and suppliers.

9.1.3.3 Compliance Investigations. Upon City's request, Contractor agrees to provide to City, within sixty calendar days, a truthful and complete list of the names of all subcontractors, vendors, and suppliers that Contractor has used in the past five years on any of its contracts that were undertaken within San Diego County, including the total dollar amount paid by Contractor for each subcontract or supply contract. Contractor further agrees to fully cooperate in any investigation conducted by City pursuant to City's Nondiscrimination in Contracting Ordinance. Contractor understands and agrees that violation of this clause shall be considered a material breach of the Contract and may result in Contract termination, debarment, and other sanctions.

9.1.4 Equal Benefits Ordinance Certification. Unless an exception applies, Contractor shall comply with the Equal Benefits Ordinance (EBO) codified in the San Diego Municipal Code (SDMC). Failure to maintain equal benefits is a material breach of the Contract.

9.1.5 Contractor Standards. Contractor shall comply with Contractor Standards provisions codified in the SDMC. Contractor understands and agrees that violation of Contractor Standards may be considered a material breach of the Contract and may result in Contract termination, debarment, and other sanctions.

9.1.6 Noise Abatement. Contractor shall operate, conduct, or construct without violating the City's Noise Abatement Ordinance codified in the SDMC.

9.1.7 Storm Water Pollution Prevention Program. Contractor shall comply with the City's Storm Water Management and Discharge Control provisions codified in Division 3 of Chapter 4 of the SDMC, as may be amended, and any and all applicable Best Management Practice guidelines and pollution elimination requirements in performing or delivering services at City owned, leased, or managed property, or in performance of services and activities on behalf of City regardless of location.

Contractor shall comply with the City's Jurisdictional Urban Runoff Management Plan encompassing Citywide programs and activities designed to prevent and reduce storm water pollution within City boundaries as adopted by the City Council on January 22, 2008, via Resolution No. 303351, as may be amended.

Contractor shall comply with each City facility or work site's Storm Water Pollution Prevention Plan, as applicable, and institute all controls needed while completing the services to minimize any negative impact to the storm water collection system and environment.

9.1.8 Service Worker Retention Ordinance. If applicable, Contractor shall comply with the Service Worker Retention Ordinance (SWRO) codified in the SDMC.

9.1.9 Product Endorsement. Contractor shall comply with Council Policy 000-41 which requires that other than listing the City as a client and other limited endorsements, any advertisements, social media, promotions or other marketing referring to the City as a user of a product or service will require prior written approval of the Mayor or designee. Use of the City Seal or City logos is prohibited.

9.1.10 Business Tax Certificate. Unless the City Treasurer determines in writing that a contractor is exempt from the payment of business tax, any contractor doing business with the City of San Diego is required to obtain a Business Tax Certificate (BTC) and to provide a copy of its BTC to the City before a Contract is executed.

9.1.11 Equal Pay Ordinance. Unless an exception applies, Contractor shall comply with the Equal Pay Ordinance codified in San Diego Municipal Code sections 22.4801 through 22.4809. Contractor shall certify in writing that it will comply with the requirements of the EPO.

9.1.11.1 Contractor and Subcontract Requirement. The Equal Pay Ordinance applies to any subcontractor who performs work on behalf of a Contractor to the same extent as it would apply to that Contractor. Any Contractor subject to the Equal Pay Ordinance shall require all of its subcontractors to certify compliance with the Equal Pay Ordinance in its written subcontracts.

ARTICLE X CONFLICT OF INTEREST AND VIOLATIONS OF LAW

10.1 Conflict of Interest Laws. Contractor is subject to all federal, state and local conflict of interest laws, regulations, and policies applicable to public contracts and procurement practices including, but not limited to, California Government Code sections 1090, *et. seq.* and 81000, *et. seq.*, and the Ethics Ordinance, codified in the SDMC. City may determine that Contractor must complete one or more statements of economic interest disclosing relevant financial interests. Upon City's request, Contractor shall submit the necessary documents to City.

10.2 Contractor's Responsibility for Employees and Agents. Contractor is required to establish and make known to its employees and agents appropriate safeguards to prohibit employees from using their positions for a purpose that is, or that gives the appearance of being, motivated by the desire for private gain for themselves or others, particularly those with whom they have family, business or other relationships.

10.3 Contractor's Financial or Organizational Interests. In connection with any task, Contractor shall not recommend or specify any product, supplier, or contractor with whom Contractor has a direct or indirect financial or organizational interest or relationship that would violate conflict of interest laws, regulations, or policies.

10.4 Certification of Non-Collusion. Contractor certifies that: (1) Contractor's bid or proposal was not made in the interest of or on behalf of any person, firm, or corporation not identified; (2) Contractor did not directly or indirectly induce or solicit any other bidder or proposer to put in a sham bid or proposal; (3) Contractor did not directly or indirectly induce or

solicit any other person, firm or corporation to refrain from bidding; and (4) Contractor did not seek by collusion to secure any advantage over the other bidders or proposers.

10.5 Hiring City Employees. This Contract shall be unilaterally and immediately terminated by City if Contractor employs an individual who within the twelve (12) months immediately preceding such employment did in his/her capacity as a City officer or employee participate in negotiations with or otherwise have an influence on the selection of Contractor.

ARTICLE XI DISPUTE RESOLUTION

11.1 Mediation. If a dispute arises out of or relates to this Contract and cannot be settled through normal contract negotiations, Contractor and City shall use mandatory non-binding mediation before having recourse in a court of law.

11.2 Selection of Mediator. A single mediator that is acceptable to both parties shall be used to mediate the dispute. The mediator will be knowledgeable in the subject matter of this Contract, if possible.

11.3 Expenses. The expenses of witnesses for either side shall be paid by the party producing such witnesses. All other expenses of the mediation, including required traveling and other expenses of the mediator, and the cost of any proofs or expert advice produced at the direct request of the mediator, shall be borne equally by the parties, unless they agree otherwise.

11.4 Conduct of Mediation Sessions. Mediation hearings will be conducted in an informal manner and discovery will not be allowed. The discussions, statements, writings and admissions will be confidential to the proceedings (pursuant to California Evidence Code sections 1115 through 1128) and will not be used for any other purpose unless otherwise agreed by the parties in writing. The parties may agree to exchange any information they deem necessary. Both parties shall have a representative attend the mediation who is authorized to settle the dispute, though City's recommendation of settlement may be subject to the approval of the Mayor and City Council. Either party may have attorneys, witnesses or experts present.

11.5 Mediation Results. Any agreements resulting from mediation shall be memorialized in writing. The results of the mediation shall not be final or binding unless otherwise agreed to in writing by the parties. Mediators shall not be subject to any subpoena or liability, and their actions shall not be subject to discovery.

ARTICLE XII MANDATORY ASSISTANCE

12.1 Mandatory Assistance. If a third party dispute or litigation, or both, arises out of, or relates in any way to the services provided to the City under a Contract, Contractor, its agents, officers, and employees agree to assist in resolving the dispute or litigation upon City's request. Contractor's assistance includes, but is not limited to, providing professional consultations,

attending mediations, arbitrations, depositions, trials or any event related to the dispute resolution and/or litigation.

12.2 Compensation for Mandatory Assistance. City will compensate Contractor for fees incurred for providing Mandatory Assistance. If, however, the fees incurred for the Mandatory Assistance are determined, through resolution of the third party dispute or litigation, or both, to be attributable in whole, or in part, to the acts or omissions of Contractor, its agents, officers, and employees, Contractor shall reimburse City for all fees paid to Contractor, its agents, officers, and employees for Mandatory Assistance.

12.3 Attorneys' Fees Related to Mandatory Assistance. In providing City with dispute or litigation assistance, Contractor or its agents, officers, and employees may incur expenses and/or costs. Contractor agrees that any attorney fees it may incur as a result of assistance provided under Section 12.2 are not reimbursable.

ARTICLE XIII MISCELLANEOUS

13.1 Headings. All headings are for convenience only and shall not affect the interpretation of this Contract.

13.2 Non-Assignment. Contractor may not assign the obligations under this Contract, whether by express assignment or by sale of the company, nor any monies due or to become due under this Contract, without City's prior written approval. Any assignment in violation of this paragraph shall constitute a default and is grounds for termination of this Contract at the City's sole discretion. In no event shall any putative assignment create a contractual relationship between City and any putative assignee.

13.3 Independent Contractors. Contractor and any subcontractors employed by Contractor are independent contractors and not agents of City. Any provisions of this Contract that may appear to give City any right to direct Contractor concerning the details of performing or providing the goods and/or services, or to exercise any control over performance of the Contract, shall mean only that Contractor shall follow the direction of City concerning the end results of the performance.

13.4 Subcontractors. All persons assigned to perform any work related to this Contract, including any subcontractors, are deemed to be employees of Contractor, and Contractor shall be directly responsible for their work.

13.5 Covenants and Conditions. All provisions of this Contract expressed as either covenants or conditions on the part of City or Contractor shall be deemed to be both covenants and conditions.

13.6 Compliance with Controlling Law. Contractor shall comply with all applicable local, state, and federal laws, regulations, and policies. Contractor's act or omission in violation of applicable local, state, and federal laws, regulations, and policies is grounds for contract

termination. In addition to all other remedies or damages allowed by law, Contractor is liable to City for all damages, including costs for substitute performance, sustained as a result of the violation. In addition, Contractor may be subject to suspension, debarment, or both.

13.7 Governing Law. The Contract shall be deemed to be made under, construed in accordance with, and governed by the laws of the State of California without regard to the conflicts or choice of law provisions thereof.

13.8 Venue. The venue for any suit concerning solicitations or the Contract, the interpretation of application of any of its terms and conditions, or any related disputes shall be in the County of San Diego, State of California.

13.9 Successors in Interest. This Contract and all rights and obligations created by this Contract shall be in force and effect whether or not any parties to the Contract have been succeeded by another entity, and all rights and obligations created by this Contract shall be vested and binding on any party's successor in interest.

13.10 No Waiver. No failure of either City or Contractor to insist upon the strict performance by the other of any covenant, term or condition of this Contract, nor any failure to exercise any right or remedy consequent upon a breach of any covenant, term, or condition of this Contract, shall constitute a waiver of any such breach of such covenant, term or condition. No waiver of any breach shall affect or alter this Contract, and each and every covenant, condition, and term hereof shall continue in full force and effect without respect to any existing or subsequent breach.

13.11 Severability. The unenforceability, invalidity, or illegality of any provision of this Contract shall not render any other provision of this Contract unenforceable, invalid, or illegal.

13.12 Drafting Ambiguities. The parties acknowledge that they have the right to be advised by legal counsel with respect to the negotiations, terms and conditions of this Contract, and the decision of whether to seek advice of legal counsel with respect to this Contract is the sole responsibility of each party. This Contract shall not be construed in favor of or against either party by reason of the extent to which each party participated in the drafting of the Contract.

13.13 Amendments. Neither this Contract nor any provision hereof may be changed, modified, amended or waived except by a written agreement executed by duly authorized representatives of City and Contractor. Any alleged oral amendments have no force or effect. The Purchasing Agent must sign all Contract amendments.

13.14 Conflicts Between Terms. If this Contract conflicts with an applicable local, state, or federal law, regulation, or court order, applicable local, state, or federal law, regulation, or court order shall control. Varying degrees of stringency among the main body of this Contract, the exhibits or attachments, and laws, regulations, or orders are not deemed conflicts, and the most stringent requirement shall control. Each party shall notify the other immediately upon the identification of any apparent conflict or inconsistency concerning this Contract.

13.15 Survival of Obligations. All representations, indemnifications, warranties, and guarantees made in, required by, or given in accordance with this Contract, as well as all continuing obligations indicated in this Contract, shall survive, completion and acceptance of performance and termination, expiration or completion of the Contract.

13.16 Confidentiality of Services. All services performed by Contractor, and any sub-contractor(s) if applicable, including but not limited to all drafts, data, information, correspondence, proposals, reports of any nature, estimates compiled or composed by Contractor, are for the sole use of City, its agents, and employees. Neither the documents nor their contents shall be released by Contractor or any subcontractor to any third party without the prior written consent of City. This provision does not apply to information that: (1) was publicly known, or otherwise known to Contractor, at the time it was disclosed to Contractor by City; (2) subsequently becomes publicly known through no act or omission of Contractor; or (3) otherwise becomes known to Contractor other than through disclosure by City.

13.17 Insolvency. If Contractor enters into proceedings relating to bankruptcy, whether voluntary or involuntary, Contractor agrees to furnish, by certified mail or electronic commerce method authorized by the Contract, written notification of the bankruptcy to the Purchasing Agent and the Contract Administrator responsible for administering the Contract. This notification shall be furnished within five (5) days of the initiation of the proceedings relating to bankruptcy filing. This notification shall include the date on which the bankruptcy petition was filed, the identity of the court in which the bankruptcy petition was filed, and a listing of City contract numbers and contracting offices for all City contracts against which final payment has not been made. This obligation remains in effect until final payment is made under this Contract.

13.18 No Third Party Beneficiaries. Except as may be specifically set forth in this Contract, none of the provisions of this Contract are intended to benefit any third party not specifically referenced herein. No party other than City and Contractor shall have the right to enforce any of the provisions of this Contract.

13.19 Actions of City in its Governmental Capacity. Nothing in this Contract shall be interpreted as limiting the rights and obligations of City in its governmental or regulatory capacity.

City of San Diego
CONTRACTOR STANDARDS
Pledge of Compliance

The City of San Diego has adopted a Contractor Standards Ordinance (CSO) codified in section 22.3004 of the San Diego Municipal Code (SDMC). The City of San Diego uses the criteria set forth in the CSO to determine whether a contractor (bidder or proposer) has the capacity to fully perform the contract requirements and the business integrity to justify the award of public funds. This completed Pledge of Compliance signed under penalty of perjury must be submitted with each bid and proposal. If an informal solicitation process is used, the bidder must submit this completed Pledge of Compliance to the City prior to execution of the contract. All responses must be typewritten or printed in ink. If an explanation is requested or additional space is required, Contractors must provide responses on Attachment A to the Pledge of Compliance and sign each page. Failure to submit a signed and completed Pledge of Compliance may render a bid or proposal non-responsive. In the case of an informal solicitation or cooperative procurement, the contract will not be awarded unless a signed and completed Pledge of Compliance is submitted. A submitted Pledge of Compliance is a public record and information contained within will be available for public review except to the extent that such information is exempt from disclosure pursuant to applicable law.

By signing and submitting this form, the contractor is certifying, to the best of their knowledge, that the contractor and any of its Principals have not within a five (5) year period – preceding this offer, been convicted of or had a civil judgement rendered against them for commission of a fraud or a criminal offense in connection with obtaining, attempting to obtain or performing a public (Federal, State or local) contract or subcontract.

“Principal” means an officer, director, owner, partner or a person having primary management or supervisory responsibilities within the firm. The Contractor shall provide immediate written notice to the Procurement Contracting Officer handling the solicitation, at any time prior to award should they learn that this Representations and Certifications was inaccurate or incomplete.

This form contains 10 pages, additional information may be submitted as part of *Attachment A*.

A. BID/PROPOSAL/SOLICITATION TITLE:

Industrial Medical Services Solicitation #: 10090302-26-L

B. BIDDER/PROPOSER INFORMATION:

Sharp Rees-Stealy Medical Group

Legal Name	DBA	San Diego
5651 Copley Drive, Suite A		
Street Address	City	State
Trung (Andy) Dang, M.D., Ranking Vice President	858-262-6009	858-262-6779
Contact Person, Title	Phone	Fax

Provide the name, identity, and precise nature of the interest* of all persons who are directly or indirectly involved** in this proposed transaction (SDMC § 21.0103). Use additional pages if necessary.

* The precise nature of the interest includes:

- the percentage ownership interest in a party to the transaction,
- the percentage ownership interest in any firm, corporation, or partnership that will receive funds from the transaction,
- the value of any financial interest in the transaction,
- any contingent interest in the transaction and the value of such interest should the contingency be satisfied, and
- any philanthropic, scientific, artistic, or property interest in the transaction.

** Directly or indirectly involved means pursuing the transaction by:

- communicating or negotiating with City officers or employees,
- submitting or preparing applications, bids, proposals or other documents for purposes of contracting with the City, or
- directing or supervising the actions of persons engaged in the above activity.

Trung (Andy) Dang, M.D.	Ranking Vice President, Sharp Rees-Stealy Medical Group
Name San Diego, CA	Title/Position
City and State of Residence Officer and Stakholder	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Melissa Major	CEO, Sharp Rees-Stealy Medical Centers
Name San Diego, CA	Title/Position
City and State of Residence Executive Administration	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Stephen W. Munday, M.D.	Chair Director, Occupational Medicine
Name San Diego, CA	Title/Position
City and State of Residence Direct Interest Medical	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Cheri Pope	Director, Urgent Care and Occupational Medicine
Name San Diego, CA	Title/Position
City and State of Residence Direct Interest Operations	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Yvonne C. Zazueta	Manager, Occupational Medicine
Name San Diego, CA	Title/Position
City and State of Residence Direct Interest Operations	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Elsa Portillo	Care Coordinator, Liaison and MPN
Name San Diego, CA	Title/Position
City and State of Residence City of San Diego Liaison and MPN	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Scott Mann	Sr. Legal Counsel
Name San Diego, CA	Title/Position
City and State of Residence Legal	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Janene Bernales	HR Strategic Business Partner
Name San Diego, CA	Title/Position
City and State of Residence Human Resources, Health	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Lori Miller	Medical Group Affiliates
Name San Diego, CA	Title/Position
City and State of Residence Human Resources, Medical Group	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Rachel Davis	Director Labor Relations, Human Resources
Name San Diego, CA	Title/Position
City and State of Residence Human Resources	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Reika Ragudos Elizabeth Brehm	Administrative Assistant-HR Workforce Insurance and Claims Analyst Risk Management
Name San Diego, CA	Title/Position
City and State of Residence Insurance	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Hector Contreras	Manager, Plant Operations/Biomed
Name San Diego, CA	Title/Position
City and State of Residence Equipment	Employer (if different than Bidder/Proposer)
Interest in the transaction	
Ines Mello-Simpson	Project Coordinator
Name San Diego, CA	Title/Position
City and State of Residence Administrative	Employer (if different than Bidder/Proposer)
Interest in the transaction	

Danielle Madsen	Administrative Secretary
Name San Diego, CA	Title/Position
City and State of Residence Administrative	Employer (if different than Bidder/Proposer)
Interest in the transaction	

C. OWNERSHIP AND NAME CHANGES:

1. In the past five (5) years, has your firm changed its name?

☐ Yes ☒ No

If **Yes**, use Attachment A to list all prior legal and DBA names, addresses, and dates each firm name was used. Explain the specific reasons for each name change.

2. Is your firm a non-profit?

☐ Yes ☒ No

If **Yes**, attach proof of status to this submission.

3. In the past five (5) years, has a firm owner, partner, or officer operated a similar business?

☐ Yes ☒ No

If **Yes**, use Attachment A to list names and addresses of all businesses and the person who operated the business. Include information about a similar business only if an owner, partner, or officer of your firm holds or has held a similar position in another firm.

D. BUSINESS ORGANIZATION/STRUCTURE:

Indicate the organizational structure of your firm. Fill in only one section on this page. Use Attachment A if more space is required.

☒ **Corporation** Date incorporated: 03/26/1985 State of incorporation: California

List corporation's current officers:

President:	<u>Michael C. Martin, M.D.</u>
Vice Pres:	<u>Michael Keefe, M.D.</u>
Secretary:	<u>Mark W. Sornson, M.D.</u>
Treasurer:	<u>Jamie D. Lavender, M.D.</u>

Type of corporation: C ☒ Subchapter S ☐

Is the corporation authorized to do business in California: ☒ Yes ☐ No

If **Yes**, after what date: 03/26/1985

Is your firm a publicly traded corporation? ☐ **Yes** ☒ **No**

If **Yes**, how and where is the stock traded? _____

If **Yes**, list the name, title and address of those who own ten percent (10 %) or more of the corporation's stocks:

Do the President, Vice President, Secretary and/or Treasurer of your corporation have a third party interest or other financial interests in a business/enterprise that performs similar work, services or provides similar goods? ☐ **Yes** ☒ **No**

If **Yes**, please use Attachment A to disclose.

Please list the following:	Authorized	Issued	Outstanding
a. Number of voting shares:	_____	_____	_____
b. Number of nonvoting shares:	_____	_____	_____
c. Number of shareholders:			_____
d. Value per share of common stock:		Par	\$ _____
		Book	\$ _____
		Market	\$ _____

Limited Liability Company Date formed: _____ State of formation: _____

List the name, title and address of members who own ten percent (10%) or more of the company:

☐ **Partnership** Date formed: _____ State of formation: _____

List names of all firm partners:

☐ **Sole Proprietorship** Date started: _____

List all firms you have been an owner, partner or officer with during the past five (5) years. Do not include ownership of stock in a publicly traded company:

☐ **Joint Venture** Date formed: _____

List each firm in the joint venture and its percentage of ownership:

Note: To be responsive, each member of a Joint Venture or Partnership must complete a separate *Contractor Standards form*.

E. FINANCIAL RESOURCES AND RESPONSIBILITY:

1. Is your firm preparing to be sold, in the process of being sold, or in negotiations to be sold?

☐ Yes ☒ No

If **Yes**, use Attachment A to explain the circumstances, including the buyer's name and principal contact information.

2. In the past five (5) years, has your firm been denied bonding?

☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances; include bonding company name.

3. In the past five (5) years, has a bonding company made any payments to satisfy claims made against a bond issued on your firm's behalf or a firm where you were the principal?

☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances.

4. In the past five (5) years, has any insurance carrier, for any form of insurance, refused to renew the insurance policy for your firm?

☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances.

5. Within the last five years, has your firm filed a voluntary petition in bankruptcy, been adjudicated bankrupt, or made a general assignment for the benefit of creditors?

☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances.

6. Are there any claims, liens or judgements that are outstanding against your firm?

☐ Yes ☒ No

If **Yes**, please use Attachment A to provide detailed information on the action.

7. Please provide the name of your principal financial institution for financial reference. By submitting a response to this Solicitation Contractor authorizes a release of credit information for verification of financial responsibility.

Name of Bank: Bank of America

Point of Contact: Joy Cachola

Address: P.O. Box 939089, San Diego, CA 92139

Phone Number: 858-499-3650

8. By submitting a response to a City solicitation, Contractor certifies that he or she has sufficient operating capital and/or financial reserves to properly fund the requirements identified in the solicitation. At City's request, Contractor will promptly provide to City

a copy of Contractor's most recent balance sheet and/or other necessary financial statements to substantiate financial ability to perform.

9. In order to do business in the City of San Diego, a current Business Tax Certificate is required. Business Tax Certificates are issued by the City Treasurer's Office. If you do not have one at the time of submission, one must be obtained prior to award.

Business Tax Certificate No.: 330106028 Year Issued: 06/27/2024

F. PERFORMANCE HISTORY:

1. In the past five (5) years, has your firm been found civilly liable, either in a court of law or pursuant to the terms of a settlement agreement, for defaulting or breaching a contract with a government agency?

☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances.

2. In the past five (5) years, has a public entity terminated your firm's contract for cause prior to contract completion?

☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances and provide principal contact information.

3. In the past five (5) years, has your firm entered into any settlement agreement for any lawsuit that alleged contract default, breach of contract, or fraud with or against a public entity?

☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances.

4. Is your firm currently involved in any lawsuit with a government agency in which it is alleged that your firm has defaulted on a contract, breached a contract, or committed fraud?

☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances.

5. In the past five (5) years, has your firm, or any firm with which any of your firm's owners, partners, or officers is or was associated, been debarred, disqualified, removed, or otherwise prevented from bidding on or completing any government or public agency contract for any reason?

☐ Yes ☒ No

If **Yes**, use *Attachment A* to explain specific circumstances.

6. In the past five (5) years, has your firm received a notice to cure or a notice of default on a contract with any public agency?

☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances and how the matter resolved.

7. Performance References:

Please provide a minimum of three (3) references familiar with work performed by your firm which was of a similar size and nature to the subject solicitation within the last five (5) years.

Please note that any references required as part of your bid/proposal submittal are in addition to those references required as part of this form.

Company Name: Port of San Diego

Contact Name and Phone Number: Steve Norby, 619-686-6236

Contact Email: snorby@portofsandiego.org

Address: 3165 Pacific Highway, San Diego, CA 92101

Contract Date: N/A

Contract Amount: N/A

Requirements of Contract: To provide Industrial Medical Services

Company Name: City of El Cajon

Contact Name and Phone Number: Salina Battisti, 619-441-1657

Contact Email: sbattisti@elcajon.gov

Address: 200 Civic Center Way, El Cajon, CA 92020

Contract Date: 07/14/2025

Contract Amount: \$21,000.00

Requirements of Contract: To provide Industrial Medical Services

Company Name: City of Poway

Contact Name and Phone Number: Rodney Ortiz, 858-668-4464

Contact Email: rotiz@poway.org

Address: 13325 Civic Center Dr., Poway, CA 92074

Contract Date: 05/14/2019

Contract Amount: \$11,575.00

Requirements of Contract: To provide Industrial Medical Services

Company Name: Joint Powers Authority (JPA)

Contact Name and Phone Number: Felicia Amenta, 951-318-3008

Contact Email: famenta@sdcoe.net

Address: 6401 Linda Vista R., San Diego, CA 92111

Contract Date: 07/01/2019

Contract Amount: \$195,000.00

Requirements of Contract: To provide Industrial Medical Services

G. COMPLIANCE:

1. In the past five (5) years, has your firm or any firm owner, partner, officer, executive, or manager been criminally penalized or found civilly liable, either in a court of law or pursuant to the terms of a settlement agreement, for violating any federal, state, or local law in performance of a contract, including but not limited to, laws regarding health and safety, labor and employment, permitting, and licensing laws?
☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances surrounding each instance. Include the name of the entity involved, the specific infraction(s) or violation(s), dates of instances, and outcome with current status.

2. In the past five (5) years, has your firm been determined to be non-responsible by a public entity?
☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances of each instance. Include the name of the entity involved, the specific infraction, dates, and outcome.

H. BUSINESS INTEGRITY:

1. In the past five (5) years, has your firm been convicted of or found liable in a civil suit for making a false claim or material misrepresentation to a private or public entity?
☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances of each instance. Include the entity involved, specific violation(s), dates, outcome and current status.

2. In the past five (5) years, has your firm or any of its executives, management personnel, or owners been convicted of a crime, including misdemeanors, or been found liable in a civil suit involving the bidding, awarding, or performance of a government contract?
☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances of each instance; include the entity involved, specific infraction(s), dates, outcome and current status.

3. In the past five (5) years, has your firm or any of its executives, management personnel, or owners been convicted of a federal, state, or local crime of fraud, theft, or any other act of dishonesty?
☐ Yes ☒ No

If **Yes**, use Attachment A to explain specific circumstances of each instance; include the entity involved, specific infraction(s), dates, outcome and current status.

4. Do any of the Principals of your firm have relatives that are either currently employed by the City or were employed by the City in the past five (5) years?
☐ Yes ☒ No

If **Yes**, please disclose the names of those relatives in Attachment A.

I. BUSINESS REPRESENTATION:

1. Are you a local business with a physical address within the County of San Diego?
☒ Yes ☐ No

2. Are you a certified Small and Local Business Enterprise certified by the City of San Diego?

☐ Yes ☒ No

Certification # _____

3. Are you certified as any of the following:

- a. Disabled Veteran Business Enterprise Certification # _____
- b. Woman or Minority Owned Business Enterprise Certification # _____
- c. Disadvantaged Business Enterprise Certification # _____

J. WAGE COMPLIANCE:

In the past five (5) years, has your firm been required to pay back wages or penalties for failure to comply with the federal, state or local **prevailing, minimum, or living wage laws**? ☐ Yes ☒ No If **Yes**, use Attachment A to explain the specific circumstances of each instance. Include the entity involved, the specific infraction(s), dates, outcome, and current status.

By signing this Pledge of Compliance, your firm is certifying to the City that you will comply with the requirements of the Equal Pay Ordinance set forth in SDMC sections 22.4801 through 22.4809.

K. STATEMENT OF SUBCONTRACTORS & SUPPLIERS:

Please provide the names and information for all subcontractors and suppliers used in the performance of the proposed contract, and what portion of work will be assigned to each subcontractor. Subcontractors may not be substituted without the written consent of the City. Use Attachment A if additional pages are necessary. If no subcontractors or suppliers will be used, please write "Not Applicable."

See MPN

Company Name: _____

Address: _____

Contact Name: _____ Phone: _____ Email: _____

Contractor License No.: _____ DIR Registration No.: _____

Sub-Contract Dollar Amount: \$ _____ (per year) \$ _____ (total contract term)

Scope of work subcontractor will perform: _____

Identify whether company is a subcontractor or supplier: _____

Certification type (check all that apply): ☐ DBE ☐ DVBE ☐ ELBE ☐ MBE ☐ SLBE ☐ WBE ☐ Not Certified

Contractor must provide valid proof of certification with the response to the bid or proposal to receive participation credit.

Company Name: _____

Address: _____

Contact Name: _____ Phone: _____ Email: _____

Contractor License No.: _____ DIR Registration No.: _____

Sub-Contract Dollar Amount: \$ _____ (per year) \$ _____ (total contract term)

Scope of work subcontractor will perform: _____

Identify whether company is a subcontractor or supplier: _____

Certification type (check all that apply): ☐ DBE ☐ DVBE ☐ ELBE ☐ MBE ☐ SLBE ☐ WBE ☐ Not Certified

Contractor must provide valid proof of certification with the response to the bid or proposal to receive participation credit.

L. STATEMENT OF AVAILABLE EQUIPMENT:

A full inventoried list of all necessary equipment to complete the work specified may be a requirement of the bid/proposal submission.

By signing and submitting this form, the Contractor certifies that all required equipment included in this bid or proposal will be made available one week (7 days) before work shall commence. In instances where the required equipment is not owned by the Contractor, Contractor shall explain how the equipment will be made available before the commencement of work. The City of San Diego reserves the right to reject any response, in its opinion, if the Contractor has not demonstrated he or she will be properly equipped to perform the work in an efficient, effective manner for the duration of the contract period.

M. TYPE OF SUBMISSION: This document is submitted as:

- ☐ Initial submission of *Contractor Standards Pledge of Compliance*
- ☐ Initial submission of *Contractor Standards Pledge of Compliance* as part of a Cooperative agreement
- ☒ Initial submission of *Contractor Standards Pledge of Compliance* as part of a Sole Source agreement
- ☒ Update of prior *Contractor Standards Pledge of Compliance* dated 10/27/2020.

Complete all questions and sign below.

Under penalty of perjury under the laws of the State of California, I certify that I have read and understand the questions contained in this Pledge of Compliance, that I am responsible for completeness and accuracy of the responses contained herein, and that all information provided is true, full and complete to the best of my knowledge and belief. I agree to provide written notice to the Purchasing Agent within five (5) business days if, at any time, I learn that any portion of this Pledge of Compliance is inaccurate. Failure to timely provide the Purchasing Agent with written notice is grounds for Contract termination.

I, on behalf of the firm, further certify that I and my firm will comply with the following provisions of SDMC section 22.3004:

- (a) I and my firm will comply with all applicable local, State and Federal laws, including health and safety, labor and employment, and licensing laws that affect the employees, worksite or performance of the contract.
- (b) I and my firm will notify the Purchasing Agent in writing within fifteen (15) calendar days of receiving notice that a government agency has begun an investigation of me or my firm that may result in a finding that I or my firm is or was not in compliance with laws stated in paragraph (a).
- (c) I and my firm will notify the Purchasing Agent in writing within fifteen (15) calendar days of a finding by a government agency or court of competent jurisdiction of a violation by the Contractor of laws stated in paragraph (a).
- (d) I and my firm will notify the Purchasing Agent in writing within fifteen (15) calendar days of becoming aware of an investigation or finding by a government agency or court of competent jurisdiction of a violation by a subcontractor of laws stated in paragraph (a).
- (e) I and my firm will cooperate fully with the City during any investigation and to respond to a request for information within ten (10) working days.

Failure to sign and submit this form with the bid/proposal shall make the bid/proposal non-responsive. In the case of an informal solicitation, the contract will not be awarded unless a signed and completed *Pledge of Compliance* is submitted.

Trung (Andy) Dang, M.D.
Ranking Vice President

Name and Title

Signed by:

Trung Dang

928B16F779D04A9...

Signature

11/4/2025

Date

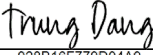
**City of San Diego
CONTRACTOR STANDARDS
Attachment "A"**

Provide additional information in space below. Use additional Attachment "A" pages as needed. Each page must be signed. Print in ink or type responses and indicate question being answered.

I have read the matters and statements made in this Contractor Standards Pledge of Compliance and attachments thereto and I know the same to be true of my own knowledge, except as to those matters stated upon information or belief and as to such matters, I believe the same to be true. I certify under penalty of perjury that the foregoing is true and correct.

Trung (Andy) Dang, M.D.
Ranking Vice President

Print Name, Title

Signed by:

Signature

11/4/2025
Date

EQUAL OPPORTUNITY CONTRACTING PROGRAM (EOCP)

GOODS AND SERVICES CONTRACTOR REQUIREMENTS

I. City's Equal Opportunity Contracting Commitment.

The City of San Diego (City) promotes equal employment and subcontracting opportunities. The City is committed to ensuring that taxpayer dollars spent on public contracts are not paid to businesses that practice discrimination in employment or subcontracting. The City encourages all companies seeking to do business with the City to share this commitment. Contractors are encouraged to take positive steps to diversify and expand their subcontractor and supplier solicitation base and to offer opportunities to all eligible business firms.

Contractors must submit the required EOCP documentation indicated below with their proposals. Contractors who fail to provide the required EOCP documentation are considered non-responsive.

II. Definitions.

Commercially Useful Function: a Small Local Business Enterprise or Emerging Local Business Enterprise (SLBE/ELBE) performs a commercially useful function when it is responsible for execution of the work and is carrying out its responsibilities by actually performing, managing, and supervising the work involved. To perform a commercially useful function, the SLBE/ELBE shall also be responsible, with respect to materials and supplies used on the contract, for negotiating price, determining quantity and quality, ordering the material, and installing (where applicable) and paying for the material itself.

To determine whether an SLBE/ELBE is performing a commercially useful function, an evaluation will be performed of the amount of work subcontracted, normal industry practices, whether the amount the SLBE/ELBE firm is to be paid under the contract is commensurate with the work it is actually performing and the SLBE/ELBE credit claimed for its performance of the work, and other relevant factors. Specifically, an SLBE/ELBE does not perform a commercially useful function if its role is limited to that of an extra participant in a transaction, contract, or project through which funds are passed in order to obtain the appearance of meaningful and useful SLBE/ELBE participation, when in similar transactions in which SLBE/ELBE firms do not participate, there is no such role performed.

Disadvantaged Business Enterprise (DBE): a certified business that is (1) at least fifty-one (51%) owned by socially and economically Disadvantaged Individuals, or, in the case of a publicly owned business at least fifty-one percent (51%) of the stock is owned by one or more socially and economically Disadvantaged Individuals; and (2) whose daily business operations are managed and directed by one or more socially and economically disadvantaged owners. Disadvantaged Individuals include Black Americans, Hispanic Americans, Asian Americans, and other minorities, or individual found to be disadvantaged by the Small Business Administration pursuant to Section 8 of the Small Business Reauthorization Act.

Disabled Veteran Business Enterprise (DVBE): a certified business that is (1) at least fifty-one percent (51%) owned by one or more Disabled Veterans; and (2) business operations must be managed and controlled by one or more Disabled Veterans. A Disabled Veteran is a veteran of the U.S. military, naval, or air service who resides in California and has a service-connected disability of at least 10% or more. The firm shall be certified by the State of California's Department of General Services, Office of Small and Minority Business.

Emerging Business Enterprise (EBE): a business whose gross annual receipts do not exceed the amount set by the City Manager, and which meets all other criteria set forth in the regulations implementing the City's Small and Local Business Preference Program. The City Manager shall review the threshold amount for EBEs on an annual basis, and adjust as necessary to reflect changes in the marketplace.

Emerging Local Business Enterprise (ELBE): a Local Business Enterprise that is also an Emerging Business Enterprise.

Local Business Enterprise (LBE): a business that has both a principal place of business and a significant employment presence in the County of San Diego, and that has been in operation for twelve (12) consecutive months.

Minority Business Enterprise (MBE): a certified business that is (1) at least fifty-one percent (51%) owned by one or more minority individuals, or, in the case of a publicly owned business at least fifty-one percent (51%) of the stock is owned by one or more minority individuals; and (2) whose daily business operations are managed and directed by one or more minorities owners. Minorities include the groups with the following ethnic origins: African, Asian Pacific, Asian Subcontinent, Hispanic, Native Alaskan, Native American, and Native Hawaiian.

Other Business Enterprise (OBE): any business which does not otherwise qualify as Minority, Woman, Disadvantaged, or Disabled Veteran Business Enterprise.

Principal Place of Business: a location wherein a business maintains a physical office and through which it obtains no less than fifty percent (50%) of gross annual receipts.

Significant Employee Presence: no less than twenty-five percent (25%) of a business's total number of employees.

Small Business Enterprise (SBE): a business whose gross annual receipts do not exceed the amount set by the City Manager, and that meets all other criteria set forth in regulations implementing the City's Small and Local Business Preference Program. The City Manager shall review the threshold amount for SBEs on an annual basis, and adjust as necessary to reflect changes in the marketplace. A business certified as a DVBE by the State of California, and that has provided proof of such certification to the City manager, shall be deemed to be an SBE.

Small Local Business Enterprise (SLBE): a Local Business Enterprise that is also a Small Business Enterprise.

Women Business Enterprise (WBE): a certified business that is (1) at least fifty-one percent (51 %) owned by a woman or women, or, in the case of a publicly owned business at least fifty-one percent (51%) of the stock is owned by one or more women; and (2) whose daily business operations are managed and directed by one or more women owners.

III. Disclosure of Discrimination Complaints.

As part of its proposal, Contractor shall provide to the City a list of all instances within the past ten (10) years where a complaint was filed or pending against Contractor in a legal or administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors, or suppliers, and a description of the status or resolution of that complaint, including any remedial action taken. (Attachment AA).

IV. Work Force Report and Equal Opportunity Outreach Plan.

- A. Work Force Report. Contractors shall submit with their proposal a Work Force Report (WFR) for approval by the City. (Attachment BB). If the City determines that there are under representations when compared to County Labor Force Availability data, then the Contractor will also be required to submit an Equal Employment Opportunity Plan (EEOP) to the City for approval. Questions regarding the WFR should be directed to the Equal Opportunity Contracting Department.
- B. Duty to Comply with Equal Opportunity Outreach Plan. A Contractor for whom an EEOP has been approved by the City shall use best efforts to comply with that EEOP.

V. Small and Local Business Program Requirements.

The City has adopted a Small and Local Business Enterprise program for goods, services, and consultant contracts. The SLBE requirements are set forth in Council Policy 100-10. For contracts in which the Purchasing Agent is required to advertise for sealed proposals in the City's official newspaper or consultant contracts valued over \$50,000, the City shall:

- A. Apply a maximum of an additional 12% of the total possible evaluation points to the Contractor's final score for SLBE or ELBE participation. Additional points will be awarded as follows:
 - a. If the Contractor achieves 20% participation, apply 5% of the total possible evaluation points to the Contractor's score; or
 - b. If the Contractor achieves 25% participation, apply 10% of the total possible evaluation points to the Contractor's score; or
 - c. If the prime contractor is a SLBE or an ELBE, apply 12% of the total possible evaluation points to the Contractor's score.

VI. Maintaining Participation Levels.

- A. Additional points are based on the Contractor's level of participation proposed prior to the award of the goods, services, or consultant contract. Contractors are required to achieve and maintain the SLBE or ELBE participation levels throughout the duration of the goods, services, or consultant contract.
- B. If the City modifies the original specifications, the Contractor shall make reasonable efforts to maintain the SLBE or ELBE participation for which the additional points were awarded. The City must approve in writing a reduction in SLBE or ELBE participation levels.
- C. Contractor shall notify and obtain written approval from the City in advance of any reduction in subcontract scope, termination, or substitution for a designated SLBE or ELBE subcontractor.
- D. Contractor's failure to maintain SLBE or ELBE participation levels as specified in the goods, services, or consultant contract shall constitute a default and grounds for debarment under Chapter 2, Article 2, Division 8, of the San Diego Municipal Code.
- E. The remedies available to the City under Council Policy 100-10 are cumulative to all other rights and remedies available to the City.

VII. Certifications.

The City accepts certifications of MBE, WBE, DBE, or DVBE from the following certifying agencies:

- A. Current certification by the State of California Department of Transportation (CALTRANS) as DBE.
- B. Current MBE or WBE certification from the California Public Utilities Commission.
- C. DVBE certification is received from the State of California's Department of General Services, Office of Small and Minority Business.
- D. Current certification by the City of Los Angeles as DBE, WBE, or MBE.

Subcontractors' valid proof of certification status e.g., copy of MBE, WBE, DBE, or DVBE certification must be submitted with the proposal or contract documents. MBE, WBE, DBE, or DVBE certifications are listed for informational purposes only.

VIII. List of Attachments.

- AA. Contractors Certification of Pending Actions
- BB. Work Force Report

2.4 The Equal Opportunity Contracting Form Including Work Force Report



EQUAL OPPORTUNITY CONTRACTING (EOC)

1200 Third Avenue, Suite 200 • San Diego, CA 92101

Phone: (619) 236-6000 • Fax: (619) 236-5904

BB. WORK FORCE REPORT

The objective of the *Equal Employment Opportunity Outreach Program*, San Diego Municipal Code Sections 22.3501 through 22.3517, is to ensure that contractors doing business with the City, or receiving funds from the City, do not engage in unlawful discriminatory employment practices prohibited by State and Federal law. Such employment practices include, but are not limited to unlawful discrimination in the following: employment, promotion or upgrading, demotion or transfer, recruitment or recruitment advertising, layoff or termination, rate of pay or other forms of compensation, and selection for training, including apprenticeship. Contractors are required to provide a completed *Work Force Report (WFR)*.

NO OTHER FORMS WILL BE ACCEPTED

CONTRACTOR IDENTIFICATION

Type of Contractor: ☐ Construction ☐ Vendor/Supplier ☐ Financial Institution ☐ Lessee/Lessor
☐ Consultant ☐ Grant Recipient ☐ Insurance Company ☐ Other

Name of Company: Sharp Rees-Stealy Medical Centers

ADA/DBA: _____

Address (Corporate Headquarters, where applicable): Sharp HealthCare - 8695 Spectrum Center Blvd.

City: San Diego County: San Diego State: CA Zip: 92123

Telephone Number: (858) 499-4000 Fax Number: (858) 499-5266

Name of Company CEO: Melissa Major

Address(es), phone and fax number(s) of company facilities located in San Diego County (if different from above):

Address: 5651 Copley Drive, Suite A

City: San Diego County: San Diego State: CA Zip: 92111

Telephone Number: (858) 262-6003 Fax Number: _____ Email: _____

Type of Business: Medical Group: Occupational Type of License: Medical Services

The Company has appointed: _____

As its Equal Employment Opportunity Officer (EEOO). The EEOO has been given authority to establish, disseminate and enforce equal employment and affirmative action policies of this company. The EEOO may be contacted at:

Address: 8659 Spectrum Center Blvd., San Diego, CA 92123

Telephone Number: (858) 499-4000 Fax Number: (858) 499-5266 Email: _____

☒ One San Diego County (or Most Local County) Work Force - Mandatory

☐ Branch Work Force *

☐ Managing Office Work Force

Check the box above that applies to this WFR.

*Submit a separate Work Force Report for all participating branches. Combine WFRs if more than one branch per county.

I, the undersigned representative of Sharp HealthCare / Sharp Rees-Stealy

(Firm Name)

San Diego

CA

hereby certify that information provided

(County)

(State)

herein is true and correct. This document was executed on this 29 day of August, 2025

(Authorized Signature)

Mariam Nawab

(Print Authorized Signature Name)

WORK FORCE REPORT – Page 2

NAME OF FIRM: Sharp HealthCare / Sharp Rees-Stealy

DATE: 8/29/2025

OFFICE(S) or BRANCH(ES): _____

COUNTY: San Diego

INSTRUCTIONS. For each occupational category, indicate number of males and females in every ethnic group. Total columns in row provided. Sum of all totals should be equal to your total work force. Include all those employed by your company on either a full or part-time basis. The following groups are to be included in ethnic categories listed in columns below:

- | | |
|--------------------------------------|---|
| (1) Black or African-American | (5) Native Hawaiian or Pacific Islander |
| (2) Hispanic or Latino | (6) White |
| (3) Asian | (7) Other race/ethnicity; not falling into other groups |
| (4) American Indian or Alaska Native | |

Definitions of the race and ethnicity categories can be found on Page 4

ADMINISTRATION OCCUPATIONAL CATEGORY	(1) Black or African American		(2) Hispanic or Latino		(3) Asian		(4) American Indian/ Nat. Alaskan		(5) Pacific Islander		(6) White		(7) Other Race/ Ethnicity	
	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)
Management & Financial	2	11	7	21	4	19	0	1	1	9	15	62	3	9
Professional	3	15	27	93	55	164	1	2	4	32	39	311	13	66
A&E, Science, Computer	0	0	2	2	1	2	0	0	0	0	1	6	0	1
Technical	15	22	53	169	35	120	1	9	15	20	43	196	16	61
Sales	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Administrative Support	17	87	41	435	20	102	0	4	3	34	32	220	16	76
Services	14	15	27	167	18	35	0	1	1	5	15	56	11	27
Crafts	0	0	6	0	0	0	0	0	0	0	1	0	1	0
Operative Workers	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Transportation	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Laborers*	0	0	0	0	0	0	0	0	0	0	0	0	0	0

*Construction laborers and other field employees are not to be included on this page

Totals Each Column	51	150	163	914	133	442	2	17	24	100	146	851	60	240
--------------------	----	-----	-----	-----	-----	-----	---	----	----	-----	-----	-----	----	-----

Grand Total All Employees	3293
---------------------------	------

Indicate by Gender and Ethnicity the Number of Above Employees Who Are Disabled.

Disabled	3	4	7	44	7	13	0	2	2	1	8	40	2	20
----------	---	---	---	----	---	----	---	---	---	---	---	----	---	----

Non-Profit Organizations Only:

Board of Directors														
Volunteers														
Artists														

WORK FORCE REPORT – Page 3

NAME OF FIRM: Sharp HealthCare / Sharp Rees-Stealy

DATE: 8/29/2025

OFFICE(S) or BRANCH(ES): _____

COUNTY: San Diego

INSTRUCTIONS: For each occupational category, indicate number of males and females in every ethnic group. Total columns in row provided. Sum of all totals should be equal to your total work force. Include all those employed by your company on either a full or part-time basis. The following groups are to be included in ethnic categories listed in columns below:

- | | |
|--------------------------------------|---|
| (1) Black or African-American | (5) Native Hawaiian or Pacific Islander |
| (2) Hispanic or Latino | (6) White |
| (3) Asian | (7) Other race/ethnicity; not falling into other groups |
| (4) American Indian or Alaska Native | |

Definitions of the race and ethnicity categories can be found on Page 4

TRADE OCCUPATIONAL CATEGORY	(1) Black or African American		(2) Hispanic or Latino		(3) Asian		(4) American Indian/ Nat. Alaskan		(5) Pacific Islander		(6) White		(7) Other Race/ Ethnicity	
	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)	(M)	(F)
Brick, Block or Stone Masons														
Carpenters														
Carpet, Floor & Tile Installers Finishers														
Cement Masons, Concrete Finishers														
Construction Laborers														
Drywall Installers, Ceiling Tile Inst														
Electricians														
Elevator Installers														
First-Line Supervisors/Managers	0	1	1	0	0	0	0	0	0	0	0	0	0	0
Glaziers														
Helpers; Construction Trade														
Millwrights														
Misc. Const. Equipment Operators														
Painters, Const. & Maintenance														
Pipelayers, Plumbers, Pipe & Steam Fitters														
Plasterers & Stucco Masons														
Roofers														
Security Guards & Surveillance Officers	10	1	11	4	5	0	0	0	1	0	8	2	4	0
Sheet Metal Workers														
Structural Metal Fabricators & Fitters														
Welding, Soldering & Brazing Workers														
Workers, Extractive Crafts, Miners														
Totals Each Column	10	2	12	4	5	0	0	0	1	0	8	2	4	0

Grand Total All Employees **48**

Indicate By Gender and Ethnicity the Number of Above Employees Who Are Disabled:

Disabled														
----------	--	--	--	--	--	--	--	--	--	--	--	--	--	--

Work Force Report

HISTORY

The Work Force Report (WFR) is the document that allows the City of San Diego to analyze the work forces of all firms wishing to do business with the City. We are able to compare the firm's work force data to County Labor Force Availability (CLFA) data derived from the United States Census. CLFA data is a compilation of lists of occupations and includes the percentage of each ethnicity we track (American Indian or Alaska Native, Asian, Black or African-American, Native Hawaiian or Pacific Islander, White, and Other) for each occupation. Currently, our CLFA data is taken from the 2010 Census. In order to compare one firm to another, it is important that the data we receive from the consultant firm is accurate and organized in the manner that allows for this fair comparison.

WORK FORCE & BRANCH WORK FORCE REPORTS

When submitting a WFR, especially if the WFR is for a specific project or activity, we would like to have information about the firm's work force that is actually participating in the project or activity. That is, if the project is in San Diego and the work force is from San Diego, we want a San Diego County Work Force Report¹. By the same token, if the project is in San Diego, but the work force is from another county, such as Orange or Riverside County, we want a Work Force Report from that county². If participation in a San Diego project is by work forces from San Diego County and, for example, from Los Angeles County and from Sacramento County, we ask for separate Work Force Reports representing your firm from each of the three counties.

MANAGING OFFICE WORK FORCE

Equal Opportunity Contracting may occasionally ask for a Managing Office Work Force (MOWF) Report. This may occur in an instance where the firm involved is a large national or international firm but the San Diego or other local work force is very small. In this case, we may ask for both a local and a MOWF Report^{1,3}. In another case, when work is done only by the Managing Office, only the MOWF Report may be necessary.³

TYPES OF WORK FORCE REPORTS:

Please note, throughout the preceding text of this page, the superscript numbers one ¹, two ² & three ³. These numbers coincide with the types of work force report required in the example. See below:

¹ One San Diego County (or Most Local County)

Work Force – Mandatory in most cases

² Branch Work Force *

³ Managing Office Work Force

**Submit a separate Work Force Report for all participating branches. Combine WFRs if more than one branch per county.*

RACE/ETHNICITY CATEGORIES

American Indian or Alaska Native – A person having origins in any of the peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment.

Asian – A person having origins in any of the peoples of the Far East, Southeast Asia, or the Indian subcontinent including, for example, Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.

Black or African American – A person having origins in any of the Black racial groups of Africa.

Native Hawaiian or Pacific Islander – A person having origins in any of the peoples of Hawaii, Guam, Samoa, or other Pacific Islands.

White – A person having origins in any of the peoples of Europe, the Middle East, or North Africa.

Hispanic or Latino – A person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin.

Exhibit A: Work Force Report Job Categories – Administration

Refer to this table when completing your firm's Work Force Report form(s).

Management & Financial

Advertising, Marketing, Promotions, Public
Relations, and Sales Managers
Business Operations Specialists
Financial Specialists
Operations Specialties Managers
Other Management Occupations
Top Executives

Professional

Art and Design Workers
Counselors, Social Workers, and Other Community
and Social Service Specialists
Entertainers and Performers, Sports and Related
Workers
Health Diagnosing and Treating Practitioners
Lawyers, Judges, and Related Workers
Librarians, Curators, and Archivists
Life Scientists
Media and Communication Workers
Other Teachers and Instructors
Postsecondary Teachers
Primary, Secondary, and Special Education School
Teachers
Religious Workers
Social Scientists and Related Workers

Architecture & Engineering, Science, Computer

Architects, Surveyors, and Cartographers
Computer Specialists
Engineers
Mathematical Science Occupations
Physical Scientists

Technical

Drafters, Engineering, and Mapping Technicians
Health Technologists and Technicians
Life, Physical, and Social Science Technicians
Media and Communication Equipment Workers

Sales

Other Sales and Related Workers
Retail Sales Workers
Sales Representatives, Services
Sales Representatives, Wholesale and
Manufacturing
Supervisors, Sales Workers

Administrative Support

Financial Clerks
Information and Record Clerks
Legal Support Workers

Material Recording, Scheduling, Dispatching,
and Distributing Workers
Other Education, Training, and Library
Occupations
Other Office and Administrative Support
Workers
Secretaries and Administrative Assistants
Supervisors, Office and Administrative Support
Workers

Services

Building Cleaning and Pest Control Workers
Cooks and Food Preparation Workers
Entertainment Attendants and Related
Workers
Fire Fighting and Prevention Workers
First-Line Supervisors/Managers, Protective
Service Workers
Food and Beverage Serving Workers
Funeral Service Workers
Law Enforcement Workers
Nursing, Psychiatric, and Home Health Aides
Occupational and Physical Therapist Assistants
and Aides
Other Food Preparation and Serving Related
Workers
Other Healthcare Support Occupations
Other Personal Care and Service Workers
Other Protective Service Workers
Personal Appearance Workers
Supervisors, Food Preparation and Serving
Workers
Supervisors, Personal Care and Service
Workers
Transportation, Tourism, and Lodging
Attendants

Crafts

Construction Trades Workers
Electrical and Electronic Equipment
Mechanics, Installers, and Repairers
Extraction Workers
Material Moving Workers
Other Construction and Related Workers
Other Installation, Maintenance, and Repair
Occupations
Plant and System Operators
Supervisors of Installation, Maintenance, and
Repair Workers
Supervisors, Construction and Extraction
Workers
Vehicle and Mobile Equipment Mechanics,

Installers, and Repairers
Woodworkers

Operative Workers

Assemblers and Fabricators
Communications Equipment Operators
Food Processing Workers
Metal Workers and Plastic Workers
Motor Vehicle Operators
Other Production Occupations
Printing Workers
Supervisors, Production Workers
Textile, Apparel, and Furnishings Workers

Transportation

Air Transportation Workers
Other Transportation Workers
Rail Transportation Workers
Supervisors, Transportation and Material
Moving Workers
Water Transportation Workers

Laborers

Agricultural Workers
Animal Care and Service Workers
Fishing and Hunting Workers
Forest, Conservation, and Logging Workers
Grounds Maintenance Workers
Helpers, Construction Trades
Supervisors, Building and Grounds Cleaning
and Maintenance Workers
Supervisors, Farming, Fishing, and Forestry
Workers

Exhibit B: Work Force Report Job Categories--Trade

Brick, Block or Stone Masons
Brickmasons and Blockmasons
Stonemasons

Carpenters

Carpet, floor and Tile Installers and Finishers
Carpet Installers
Floor Layers, except Carpet, Wood and Hard
Tiles
Floor Sanders and Finishers
Tile and Marble Setters

Cement Masons, Concrete Finishers
Cement Masons and Concrete Finishers
Terrazzo Workers and Finishers

Construction Laborers

Drywall Installers, Ceiling Tile Inst
Drywall and Ceiling Tile Installers
Tapers

Electricians

Elevator Installers and Repairers

First-Line Supervisors/Managers
First-line Supervisors/Managers of
Construction Trades and Extraction Workers

Glaziers

Helpers, Construction Trade
Brickmasons, Blockmasons, and Tile and
Marble Setters
Carpenters
Electricians
Painters, Paperhangers, Plasterers and Stucco
Pipelayers, Plumbers, Pipefitters and
Steamfitters
Roofers
All other Construction Trades

Millwrights

Heating, Air Conditioning and Refrigeration
Mechanics and Installers
Mechanical Door Repairers
Control and Valve Installers and Repairers
Other Installation, Maintenance and Repair
Occupations

Misc. Const. Equipment Operators

Paving, Surfacing and Tamping Equipment
Operators
Pile-Driver Operators
Operating Engineers and Other Construction
Equipment Operators

Painters, Const. Maintenance

Painters, Construction and Maintenance
Paperhangers

Pipelayers and Plumbers

Pipelayers
Plumbers, Pipefitters and Steamfitters

Plasterers and Stucco Masons**Roofers****Security Guards & Surveillance Officers****Sheet Metal Workers****Structural Iron and Steel Workers****Welding, Soldering and Brazing Workers**

Welders, Cutter, Solderers and Brazers
Welding, Soldering and Brazing Machine
Setter, Operators and Tenders

Workers, Extractive Crafts, Miners

2.4 Contractors Certification of Pending Actions

As part of this Contract, the Contractor must provide to the City a list of all instances within the past 10 years where a complaint was filed or pending against the Contractor in a legal or administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers, and a description of the status or resolution of that complaint, including any remedial action taken.

CHECK ONE BOX ONLY.

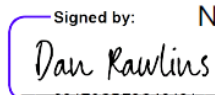
- ☐ The undersigned certifies that within the past 10 years the Contractor has NOT been the subject of a complaint or pending action in a legal administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers.
- ☒ The undersigned certifies that within the past 10 years the Contractor has been the subject of a complaint or pending action in a legal administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers. A description of the status or resolution of that complaint, including any remedial action taken and the applicable dates is as follows:

DATE OF CLAIM	LOCATION	DESCRIPTION OF CLAIM	LITIGATION (Y/N)	STATUS	RESOLUTION/ REMEDIAL ACTION TAKEN
12/6/2024	SRS	Discrimination in violation of FEHA	N	Open	Investigation assigned to outside attorney. No findings. Sharp responded to opposing counsel; pending response.
5/14/2025	SRS	Racial harassment/ discrimination	N	Open	Received demand letter; assigned to outside counsel. Investigation and response ongoing.
1/28/2025	SRS	Disability discrimination	N	Open	Employee transferred and then reported a need for accommodation.

					Previous modified workstation was moved to her new location.
7/10/2025	SRS	Discrimination based on race	N	Open	EEOC complaint received and assigned to outside counsel for investigation; pending an outcome.
3/13/2024	SRS	Discrimination	N	Open	Claim received; no investigator assigned at DIR. Pending next steps from DIR.
5/17/2025	SRS	Disability discrimination	N	Open	Engaged outside counsel to conduct investigation and respond to CRD/EEOC. No findings to date.

Contractor Name: Sharp Rees-Stealy (SRS)

Certified By: Dan Rawlins Title: VP Labor Relations & Employment

Signed by: Name

384F6CB72C46421... Date: 10/3/2025
Signature

Equal Opportunity Contracting
Sole Source Contracts, Cooperative Procurement Contracts
Goods/Services Contracts Under \$150,000
Revised 1/1/16
OCA Document No. 1208377

CHECK ONE BOX ONLY.

- ☐ The undersigned certifies that within the past 10 years the Contractor has NOT been the subject of a complaint or pending action in a legal administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers.
- ☒ The undersigned certifies that within the past 10 years the Contractor has been the subject of a complaint or pending action in a legal administrative proceeding alleging that Contractor discriminated against its employees, subcontractors, vendors or suppliers. A description of the status or resolution of that complaint, including any remedial action taken and the applicable dates is as follows:

DATE OF CLAIM	LOCATION	DESCRIPTION OF CLAIM	LITIGATION (Y/N)	STATUS	RESOLUTION/ REMEDIAL ACTION TAKEN
7/31/2025	Administration	EEOC claim	N	In progress	
8/28/2025	Administration	CRD Claim	N	In progress	
1/23/2023	Administration	Wrongful term with/discrimination	N	Settled	Settled out of court

Contractor Name: Sharp Rees-Stealy (SRS)

Certified By: Lori Miller

Title: Administrative Chief of Staff

DocuSigned by:

 A2D972CF0BB34F0...
 Signature

Date: 10/2/2025

2.6 Licenses as required in Exhibit B

Physician Assistant Board 2005 Evergreen Street, Suite 2250 Sacramento, CA 95815 (916) 561-8780  PHYSICIAN ASSISTANT License No. PA54638 Expiration 09/30/2026 CATHERINE A SUNDLOFF 3175 COWLEY WAY APT 116 SAN DIEGO, CA 92117-6500	Physician Assistant Board 2005 Evergreen Street, Suite 2250 Sacramento, CA 95815 (916) 561-8780  PHYSICIAN ASSISTANT License No. PA53509 Expiration 07/31/2027 STEPHEN K ALLAN 10243 GENETIC CENTER DR SAN DIEGO, CA 92121-6310
Physician Assistant Board 2005 Evergreen Street, Suite 2250 Sacramento, CA 95815 (916) 561-8780  PHYSICIAN ASSISTANT License No. PA58328 Expiration 12/31/2025 TIFFANY NGUYEN 16899 W BERNARDO DR SAN DIEGO, CA 92127-1603	Physician Assistant Board 2005 Evergreen Street, Suite 2250 Sacramento, CA 95815 (916) 561-8780  PHYSICIAN ASSISTANT License No. PA56727 Expiration 02/28/2027 CALVIN PHILIP MILLER 11665 WANNACUT PL SAN DIEGO, CA 92131-3734
Physician Assistant Board 2005 Evergreen Street, Suite 2250 Sacramento, CA 95815 (916) 561-8780  PHYSICIAN ASSISTANT License No. PA18217 Expiration 11/30/2025 DOLLY ANN V RICAFORT 1809 MEEKS BAY DR CHULA VISTA, CA 91913-1651	Physician Assistant Board 2005 Evergreen Street, Suite 2250 Sacramento, CA 95815 (916) 561-8780  PHYSICIAN ASSISTANT License No. PA64059 Expiration 08/31/2027 JUSTIN JAMES JUDILLA 9030 TICKET ST SAN DIEGO, CA 92126-2843
Physician Assistant Board 2005 Evergreen Street, Suite 2250 Sacramento, CA 95815 (916) 561-8780  PHYSICIAN ASSISTANT License No. PA18131 Expiration 08/31/2027 STEVEN K SHEVLIN 9204 HECTOR AVE SAN DIEGO, CA 92123-3530	Physician Assistant Board 2005 Evergreen Street, Suite 2250 Sacramento, CA 95815 (916) 561-8780  PHYSICIAN ASSISTANT License No. PA18084 Expiration 07/31/2027 ZERLA CRUZ STOLLER 3130 ERIE ST SAN DIEGO, CA 92117-6148

2.7 “Reserved” as stated in the City of San Diego RFP

2.8 Additional Information as required Exhibit B

C. 4 Requirements Overview - Policy: Medical Records Retention

Status	Active	PolicyStat ID	14649698
Origination	12/1/1995	Owner	Vena Sithong: HIM Quality Coord-SRS
Last Approved	5/8/2024	Policy Area	Health Information Services
Effective	5/8/2024	Applicability	Rees - Sharp
Last Revised	5/8/2024	References	AAAHC, Medical Records, Policy
Next Review	5/8/2027		

Records Retention at Sharp Rees-Stealy Medical Centers (SRSMC), 12004

I. PURPOSE:

A record retention schedule is created based upon department requirements such as:

- The requirements of the law
- The frequency of use of the record
- Space constraints for physical charts and storage of electronic health records
- The departmental structure

II. DEFINITIONS:

- Non-Occupational Medical records** – An individual medical record established for each person receiving care for non-work related visits, identified with the patient's unique SRSMC entity medical record number (EMRN).
- Occupational Medicine records** – An individual medical record established for each person receiving care for work related injuries or work related physical exams, identified with the patient's unique SRSMC occupational medical record number (OMRN).
- Hybrid record** – A medical record consisting of both a paper record and electronic record.

III. TEXT:

Medical documentation stored in the paper record and/or in the EHR is to be considered the legal record. All paper medical records and EHR records are maintained in a safe area restricted from public access and viewing.

- A. For any paper, film, digital image or electronic records not referenced in this policy or any other SRSMC policy, SRSMC shall follow the recommendations of the California Healthcare Associations' "Records Retention Guide: For all Healthcare Providers". Contact SRSMC Regulatory Compliance for a copy.

B. Non-Occupational and Occupational Medicine Records

1. Documentation may be maintained in a paper record only, EHR only, or may consist of a hybrid record. All non-occupational records dating 10/1/2006 and forward are electronic records. Prior to that data may be electronic and/or paper-based.
2. For all patients excluding Medi-Cal recipients, the records of adults and emancipated minors will be retained for no less than ten (10) years following the patient's last visit at SRSMC. Records of un-emancipated minors will be retained for at least one year after the patient has reached the age of eighteen (18) years, but in no event less than ten (10) years following the patient's last visit at SRSMC.
3. Some paper based records may be destroyed once the entire record has been electronically stored. Non-occupational and Occupational Medicine records are scanned into the EHR. Once quality assurance (QA) is done on individual pages of the paper based record the pages are stamped "scanned" and returned to the paper record.
4. Records that have been destroyed are archived in the EHR.

C. Medi-Cal Patients

1. The retention periods extends beyond the minimum retention period as follows:
 - a. The later of:
 - 10 years from the date of the contract period between the plan and the provider (for Medi-Cal managed care enrollees)
 - 10 years from the date of completion of any audit; or
 - 10 years from the date the service was rendered

D. Clinical Research Records

1. Medical records of patients who have participated in Clinical Research studies at SRSMC will be retained for a period of time that meets requirements established by the Clinical Research Department. Charts that are subject to queries are located at the Sharp HealthCare Clinical Trails office. Inactive research charts are stored at Sharp Record Archives and retained for 15 years.

E. Litigated Files

1. Medical records of person's party to litigation in which SRSMC and/or a Sharp Rees-Stealy Medical Group provider are named shall be preserved for a period of not less

than ten (10) years following closure of the litigation.

IV. CROSS REFERENCES:

- A. Sharp Rees-Stealy Policy 12037, Confidentiality and Release of Information – Non-Occupational and Occupational Medicine Health Records
- B. Sharp HealthCare P&P 01221 Record Retention & Destruction Policy
- C. Sharp Rees-Stealy 12036.99, Record Handling for Medical Records – HIM Department Handling and Retention

V. REFERENCES:

- A. California Healthcare Associations' "Records Retention Guide: For all Healthcare Providers".

VI. ORIGINATOR:

Health Information Management Department (HIM)

VII. LEGAL REFERENCES:

CA Health & Safety Code 1795.26 & 123149 (Sections c & d)

VIII. ACCREDITATION:

AAAHC: Accreditation Association for Ambulatory Health Care, Inc.

IX. ATTACHMENTS:

None

X. APPROVALS:

A. Ongoing:

- 1. Health Information Management Committee: 02/01; 10/06; 04/11; 06/11; 02/14; 11/17; 05/24
- 2. SRS P&P Committee: 09/02; 05/24

B. Historic:

- 1. Health Information Manager: 03/07; 06/11; 03/14; 01/18
- 2. Total Operations Planning: 05/06
- 3. Director, Regulatory Compliance: 12/07
- 4. Coordinator Regulatory Compliance: 04/15
- 5. Manager, Occupational Health Services: 03/14; 11/17
- 6. Sharp HealthCare Legal Counsel: 01/18

7. Council of Department Chairs: 09/02; 01/07
8. Council of Department Chairs: 09/02; 01/07
9. Quality Council: 07/02, 01/07

XI. REPLACES:

None

XII. HISTORY:

System #12004; originally dated 12/95

Revised/Reviewed: 11/02-document deleted under revisions were made; 09/02-document updated & reinstated; 11/05-reviewed by Health Information Manager; 03/07-Revised by Health Information Manager; 01/08, 05/11-Reviewed by Health Information Manager; 06/11-Revised by Health Information Manager; 3/14; 12/14; 04/15; 01/18; 03/18

Approval Signatures

Step Description	Approver	Date
Site Admin	Tamara Westgate: Document Control Spec-Lab	5/8/2024
Regulatory	Samer Shaker: Regulatory Comp Coord-SRS	5/8/2024
Editor	Kristin Bumroongchart: Mgr HIM-SRS	5/8/2024
	Vena Sithong: HIM Quality Coord-SRS	5/7/2024

Applicability

Sharp HealthCare, Sharp Rees Stealy

2.8 Additional Information as required Exhibit B

Policy: Record Handling Medical Record-HIM Department Handling And Retention

Status	Active	PolicyStat ID	13678154
Origination	6/26/2020	Owner	Vena Sithong: HIM Quality Coord-SRS
Last	5/8/2024	Policy Area	Health Information Management (HIM)
Approved		Applicability	Rees - Sharp
Effective	5/8/2024		
Last Revised	5/8/2024		
Next Review	5/8/2027		

Record Handling for Medical Record – HIM Department Handling And Retention, 12036.99

I. PURPOSE

To establish guidelines for preserving and releasing copies of the medical record of a patient with a lawsuit or claim against Sharp Rees-Stealy Medical Centers (SRSMC) or Sharp Rees-Stealy Medical Group (SRSMG) and to maintain the availability of the medical record for patient care and use by other authorized users.

II. DEFINITIONS

- A. **Claim:** A demand for something (money) due or believed to be due.
- B. **Suit (AKA Lawsuit):** Applies to any proceeding in a court of justice, in which the plaintiff pursues, in such court, the remedy which the law affords him.
- C. **Litigated File:** The medical record of a party in a lawsuit.
- D. **Non-Occupational Record:** An individual medical record established for each person receiving care for non-work-related visits.
- E. **Occupational Medicine Record:** An individual medical record established for each person receiving care for work-related injuries or work-related physical exams.
- F. **Hybrid Record:** A medical record consisting of a combination of a paper-based medical record and an electronic health record (EHR).

III. TEXT

- A. In the event that Sharp Rees-Stealy (SRS) is involved in a lawsuit or claim, it is essential to

maintain the integrity of the medical record and at the same time preserve the record's availability for patient care.

1. Nothing is to be added to the paper-based medical record unless it is dated with the current date and signed by the provider making the entry.
 2. Nothing is to be removed from the paper-based medical record.
 3. If any misfiled documentation is noted in the paper-based medical record it must be returned to the HIM Department for correction. The information will be properly notated per medical record guidelines.
 4. If any misfiled documentation is noted in the EHR, an In-Basket message must be created to the HIM Department for correction. The information will be properly redacted per medical record guidelines.
- B. The HIM Department notifies the applicable departments to submit the requested documentation to the HIM Department for collective release to the requester.
- C. A copy of the record may be produced in paper or electronic, at the preference of the requester.

IV. PROCEDURE

PROCEDURE	RESPONSIBILITY
Each department with applicable documentation will prepare their records for release and/or preservation according to their respective department guidelines. Departments may include HIM, Radiology, Laboratory, Patient Financial Services, Information Systems, and Pharmacy. Non-Occupational and Occupational records will be handled according to the applicable laws for each. Upon receipt of information from all departments, HIM completes a written declaration to the correctness, completion and the contents of the documentation.	Applicable department, employee physician, HIM Support Specialist
REQUEST FOR HYBRID RECORDS HIM will perform the following steps prior to releasing the record to the requester. A. If paper records exist 1. Use the EHR to request the paper-based record from the Sharp Record Archives. 2. Records will be scanned into the EHR, and quality assurance will be performed at 100%. 3. A copy of hybrid records will be kept in the HIM Release of Information Module.	HIM Support Specialist

PROCEDURE	RESPONSIBILITY
B. If paper records do not exist, no further action required. C. A paper-based record involved in a claim or lawsuit should not be destroyed until the case has closed, and retention guidelines have been met. D. Upon subsequent requests for the same patient record by the same requester: 1. Hybrid Record: a. Copy the paper-based record as applicable. b. Print all additional EHR documentation from the date of the last print-out. i. Update the EHR Tracking Log Coversheet. E. As HIM is notified of litigation for patient records, the Risk Management Department will provide information on open litigated cases to HIM. For closed cases: 1. The paper-based record is pulled, back scanned and returned to the Sharp Record Archives. 2. Use EHR to unarchive the paper-based record adding a statement in the "Comments" field indicating the closed case status. a. Transfer and log the record to Sharp Record Archives. 3. The HIM Department will retain the paper-based record as such: a. "Do Not Destroy before (destruction date)" coversheet will be completed and filed as the first page of the record. b. Records on adult patients will be flagged for retention for two (2) years from the date the case closed.	

PROCEDURE	RESPONSIBILITY
c. Records on adult patients involving a minor are retained for two (2) years and until the child reaches age 19. d. Records on minor patients will be flagged for retention for three (3) years from the date the case is closed and until the child reaches age 19. 4. All accompanying information will be discarded into the confidential shredding bin. F. Chart Security can be tracked through Audit Log Details in EHR.	

V. REFERENCES

AAAHC Manual, Chapter 3, Administration

VI. CROSS REFERENCES

Subpoena, Summons and Complaint Acceptance - 04309.99

VII. ORIGINATORS

SRS Health Information Management

VIII. LEGAL REFERENCES

None

IX. ACCREDITATION

AAAHC

X. APPROVALS

A. Ongoing

1. SRS HIM (Health Information Management) Committee: 08/01, 11/17, 5/20, 05/24
2. SRS Policy & Procedure Committee: 09/02, 03/14, 6/20, 05/24
3. Health Information Manager: 11/05, 03/09, 10/10, 03/14, 11/17, 5/20, 05/24

B. Historic

1. Quality Manager: 03/14, 10/17
2. Quality Council: 03/01
3. CDC: 7/01
4. Admin Forum: 7/01
5. LTM: 7/01
6. Director of Quality Improvement: 11/05, 03/09, 10/10

XI. REPLACES

None

XII. HISTORY

System #12036.99; originally dated 09/02

Revised/Reviewed: 11/05; 11/07; 08/09; 10/10, 05/11, 04/14, 01/16, 11/17, 9/23

Approval Signatures

Step Description	Approver	Date
Site Admin	Tamara Westgate: Document Control Spec-Lab	5/8/2024
Regulatory	Samer Shaker: Regulatory Comp Coord-SRS	5/8/2024
Editor	Kristin Bumroongchart: Mgr HIM-SRS	5/8/2024
	Vena Sithong: HIM Quality Coord-SRS	5/7/2024

2.8 Additional Information as required Exhibit B

Policy: Notice of Privacy Practices

Status **Active** PolicyStat ID **16565359**



Origination4/1/2003

Last Approved10/1/2024

Effective10/1/2024

Last Revised7/18/2018

Next Review10/1/2025

OwnerMelony Davis:
Project Mgr-
Privacy

Policy AreaPrivacy

ApplicabilitySCOR SCV SGH
SMB SMC SMH
SMV SRS

ReferencesCompliance,
HIPAA, Policy
& Procedure
+ 2 more

Notice of Privacy Practices, 01955.99

I. PURPOSE:

The purpose of this policy is to establish a policy for the creation and distribution of a Notice of Privacy Practices document to individuals receiving services at Sharp. This document is available in both English and Spanish languages. Our Notice and the process of obtaining patient acknowledgement are intended to promote the individuals understanding of Sharp's privacy practices. These also serve to provide the patient with an opportunity to request additional restrictions or confidential communications.

II. DEFINITIONS:

- A. **Direct Treatment Relationship:** provides services, products, diagnosis, or results directly to the patient.
- B. **Indirect Treatment Relationship:** provides services, products, diagnoses, or results based on the orders of another health care provider. Also delivers its products, services, diagnoses, or results to the other health care provider.
- C. **Protected Health Information ("PHI"):** means any individually identifiable health information that is: (1) transmitted or maintained by electronic media, or (2) transmitted or maintained any other form or medium.

III. POLICY:

- A. In compliance with federal regulations, Sharp provides a Notice of Privacy Practices document

Notice of Privacy Practices, 01955.99. Retrieved 8/25/2025. Official copy at <http://sharp-healthcare.policystat.com/policy/16565359/>. Copyright © 2025 Sharp HealthCare

Page 1 of 5

(Attachment A) for the purpose of adequately informing individuals, or their legal representative, of:

1. Ways in which Sharp may use and disclose their PHI,
 2. Individuals rights regarding their health information,
 3. Sharp's legal responsibilities with respect to PHI.
- B. Sharp's "Notice of Privacy Practices" is provided to, and acknowledgement of receipt obtained from, all patients or their legal representatives with who Sharp has a direct treatment relationship.
- C. Sharp will accommodate reasonable requests for information restrictions and alternate confidential communications, unless a law requires us to share the requested information. We will consider requests based on the scope of the request. We also evaluate whether our system capabilities can comply with those requests. Sharp will accommodate requests from patients who pay out-of-pocket (in full) for their treatment or services, unless a law requires us to share that information.
- D. Sharp's Notice of Privacy Practice will also be available to individuals through the following mechanisms:
1. Posted in a clear and prominent location where individuals seeking services may reasonably be able to read it.
 2. Posted, with an ability to print a copy, in a clear and prominent location at the bottom section of Sharp's internet site ("Company Info") at <http://www.sharp.com/index.cfm>
 3. All registration areas at each Sharp facility where patients seek treatment.

IV. PROCEDURES:

- A. Notice of Privacy Practice Requirements:
1. The Notice must contain all mandatory elements per federal regulation (Attachment B).
 2. We archive all versions of the Notice for at least 6 years.
 3. We update the Notice with any change in laws or material changes to Sharp's privacy practices.
- B. We Provide the Notice of Privacy Practices:
1. To all patients or their legal representatives (i.e. parent, guardian, power of attorney for health care or patient representative).
 2. No later than the first service delivery date (after April 14, 2003).
 3. As soon as reasonably practical after an emergency.
 4. If the first provision of service is provided by electronic means, then notice must be furnished electronically automatically with the first request for service (i.e. Telemedicine). Service does not include appointment scheduling.
 5. When a substantial change in the content of the privacy notice occurs, we will provide a new notice to the patient at the next service encounter.

C. For Patient Requests for Restriction of Information:

1. For all hospital admissions; you should inform patients of their right to restrict all or a portion of the facility directory.
2. For requests of restriction beyond the directory elements, you should provide patients with a "Request for Restriction on Use or Disclosure of Information" form. (Attachment C)
3. Next, forward the form to the Registration/Administration Manager or Health Information/Medical Records Department. These departments determine Sharp's information restriction capabilities.
4. You must provide the patient with a written response to their request. You should use the form entitled "Response to Request for Restrictions" form. (Attachment E)
5. If a patient request to terminate the request to restrict, have patient complete the Termination of Special Restriction Form. (Attachment F)

D. For Patient Requests for "Confidential Communication":

1. Ask the patient to provide the request in writing. Use the form entitled "Request for Restriction on the Method of Communicating Information."
2. The patient's request must specify the exact communication changes the patient desires.
3. Notify the appropriate Manager to evaluate Sharp's capabilities for complying with the request.
4. Provide the patient with a "Response to Request for Restrictions" form.

E. Patient acknowledgment of their receipt of the "Notice of Privacy Practices":

1. Acknowledgement must be a written signature or initials on the Conditions of Admission or registration form.
2. We must maintain their acknowledgement for at least 6 years.
3. If you are unable to obtain the acknowledgement, document a good faith effort to obtain the acknowledgment.
4. In an emergency, obtain the acknowledgment during the process of completing the registration paperwork as circumstances allow.

V. REFERENCES:

- A. 45 CFR Parts 160 General Administrative Requirements and 164 Security & Privacy

VI. ORIGINATOR:

Corporate Compliance

VII. LEGAL REFERENCES:

45 CFR Parts 160 and 164

VIII. ACCREDITATION:

TJC - Information Management

IX. CROSS REFERENCES:

A. #01959.00	Health Information: Request for Accounting of Disclosures
B. #01964.99	Health Information: Request for Amendment
C. #01950.99	Confidentiality of Protected Health Information
D. #01953.99	Health Information: Disclosure to Law Enforcement Officials
E. #01952.99	Health Information: Disclosure of Patient Information to the Public and Media
F. #01951.99	Health Information: Access, Use, and Disclosures
G.	Conditions of Admission/Conditions of Registration Forms

X. APPROVALS:

- A. Privacy Compliance Committee – 10/02; 01/14; 09/15
- B. Entity Compliance Committees – 11/02
- C. Entity Health Information Departments – 10/02
- D. System Policy & Procedure Steering Committee – 03/03
- E. HIPAA Policy & Procedure Subcommittee – 10/02
- F. Corporate Compliance - 10/04; 09/06; 01/08; 07/11; 1/14; 09/15

XI. REPLACES:

None

XII. HISTORY:

System #01955.99 originally dtd 04/03

Reviewed/Revised: 10/04-reviewed; 09/06-reviewed, no changes; 01/08; 07/11; 03/14- Revised; 09/15; 07/18

A. Attachments

Attachments

 [A: Notice of Privacy Practices](#)

- 🔗 [B: Notice of Privacy Practice, Mandatory Elements](#)
- 🔗 [C: Request for Restriction on Use or Disclosure of Information Form](#)
- 🔗 [D: Request for Restriction on the Method of Communicating Information](#)
- 🔗 [E: Response to Request for Restrictions](#)
- 🔗 [F: Termination of Restriction](#)

Approval Signatures

Step Description	Approver	Date
Administrator	Tamara Westgate: Prgm Mgr- Policies and Procedures	10/1/2024
	Bernadine Flores: Dir Privacy	10/1/2024
	Melony Davis: Project Mgr- Privacy	9/26/2024

Applicability

Chula Vista, Coronado, Grossmont, Mary Birch, McDonald Center, Memorial, Mesa Vista, Sharp HealthCare, Sharp Rees Stealy

References

Compliance, HIPAA, Policy & Procedure, Privacy, TJC-Information Management

2.8 Additional Information as required Exhibit B

Policy: Notice of Privacy Practices Attachment A: Notice of Privacy Practices



NOTICE OF PRIVACY PRACTICES

Effective Date: April 14, 2003

(Required by federal regulation 45 CFR 164.520)

THIS NOTICE DESCRIBES HOW MEDICAL INFORMATION ABOUT YOU MAY BE USED AND DISCLOSED AND HOW YOU CAN GET ACCESS TO THIS INFORMATION. PLEASE REVIEW IT CAREFULLY.

Our Pledge Regarding Your Health Information

We understand that information about you and your health is confidential. We are committed to protecting the privacy of this information. Each time you visit a Sharp HealthCare facility we create a record of the care and services you receive. We need this record to provide you with quality care and to comply with legal requirements. This notice applies to all of the records of your care created by any of the Sharp HealthCare affiliated entities, whether made by any health care personnel or your physician.

This notice describes your health care information privacy rights and the obligations Sharp HealthCare has regarding how we may use and disclose your health information.

Our Responsibilities

Federal and California law makes us responsible for safeguarding your protected health information. We must provide you with this notice of our privacy practices and follow the terms of the notice currently in effect. We will notify you if a breach of your protected health information occurs and we will not disclose your information (other than as described below) without your written permission.

Changes to this notice: We reserve the right to change this notice. We reserve the right to make the revised or changed notice effective for your current health information and any information we receive in the future. We will post a copy of the current notice throughout our organization and on our Web site at www.sharp.com. A copy of the notice currently in effect will be available at the registration area of each Sharp HealthCare facility.

How We May Use and Disclose Your Protected Health Information

California and federal law permits disclosures of your health information without any verbal or written permission from you. The following categories describe different ways that we use your health information within Sharp HealthCare and disclose your health information to persons and entities outside of Sharp HealthCare. We have not listed every use or disclosure within the categories below. For more information on how we can use your protected health information, see www.hhs.gov/ocr/privacy/hipaa/understanding/consumers/index.html.

Your Contact Information: We may use and disclose your contact information. Some examples of how this information may be used include appointment reminders, to update you on your care or care-management options, or to work with you on payment arrangements. By providing us with your contact information, you give your consent that we may use it. We may contact you by the following means (even if we initiate contact using an automated telephone dialing system and/or an artificial or prerecorded voice):

- a paging service,
- cellular telephone service,

- specialized mobile radio service,
- other radio common carrier service, or
- any other service that charges you for receiving the contact.

Treatment: We may use your health information to provide or coordinate your medical treatment and services. We may disclose health information about you to doctors, nurses, technicians, medical students, interns or other allied health personnel who are involved in providing for your well-being during your visit with us. We also may communicate information to another non-Sharp health care provider for the purposes of coordinating your continuing care. If you telephone our Nurse Connection service to seek advice for health care, we may use and disclose the information you provide to us to a care team member to assist in providing quality health care.

Payment: We may use and disclose your information for billing and to arrange for payment from you, an insurance company, a third party or a collection agency. This also may include the disclosure of health information to obtain prior authorization for treatment and procedures from your insurance plan.

Health Care Operations: We may use and disclose relevant health information about you for health care operations, a variety of activities necessary to operate our health care facility and to make sure all of our patients receive quality care. Examples include:

- quality assurance activities
- post-discharge telephone calls to follow-up on your health status
- granting medical staff credentials
- administrative activities, including Sharp HealthCare financial and business planning and development
- customer service activities including investigation of complaints, and
- certain marketing activities such as health education options for treatment and services

Fund Raising: We may use demographic information and your dates of service for our own fundraising purposes. If you would prefer not to receive fundraising material, you may choose to opt out of receiving these communications.

Business Associates: There are some services provided in our organization through contracts with business associates. Examples of business associates include accreditation agencies, management consultants, quality assurance reviewers, and billing and collection services. We may disclose your health information to our business associates so that they can perform the job we've asked them to do. To protect your health information, we require our business associates to sign a contract or written agreement stating that they will appropriately safeguard your health information.

Special Situations That Do Not Require Your Authorization

Organ and Tissue Donation: We may release health information to organizations that handle organ, eye or tissue procurement or transplantation.

Research That Does Not Require Individual Authorization: Sharp Health Care follows applicable federal and California law and established procedures meant to ensure your safety and privacy. We may disclose your protected health information to researchers when an Institutional Review Board ("IRB") has determined, that there is minimal risk to you, and your express consent is not required.

Military and Veterans: If you are a member of the armed forces, we may release health information about you as required by military command authorities.

Worker's Compensation: We may release health information about you for worker's compensation or similar programs if you have a work-related injury. These programs provide benefits to you for your work related injuries.

Averting a Serious Threat to Health or Safety: When necessary, we may use and disclose health information about you to prevent a serious threat to your health or safety or to the health and safety of another person or the public.

Health Oversight Activities: We may disclose health information to a health oversight agency for activities authorized by law. These oversight activities include audits, investigations, inspections and licensure. These activities are necessary for the government to monitor the health care system, government programs and compliance with civil rights laws.

Public Health Activities: We may disclose health information about you for public health activities. These generally include the following:

- To prevent or control disease, injury or disability
- To report births and deaths
- To report child and adult abuse or neglect
- To report reactions to medications, problems with products or other adverse events
- To notify people of recalls of products they may be using
- To notify a person who may have been exposed to a disease or may be at risk for contracting or spreading a disease or condition

Lawsuits and Disputes: If you are involved in a lawsuit or a dispute, we may disclose health information about you in response to a court or administrative order. We may disclose health information about you in response to a subpoena, discovery request or other lawful process by someone else involved in the dispute.

Law Enforcement: We may disclose health information if asked to do so by law enforcement officials for the following reasons:

- In response to a court order, subpoena, warrant, summons or similar process
- To identify or locate a suspect, fugitive, material witness or missing person
- To identify the victim of a crime if, under certain circumstances, we are unable to obtain the person's authorization
- To release information about a death we believe may be the result of criminal conduct
- To provide information about criminal conduct at our facility
- In emergency circumstances, to report a crime, the location of the crime or victims, or the identity, description or location of the person who committed the crime

Coroners, Medical Examiners and Funeral Directors: We may disclose health information to a coroner or medical examiner. This may be necessary to identify a deceased person or determine the cause of death of a person. We also may release health information about patients at our facility to funeral directors as necessary to carry out their duties.

National Security and Intelligence Activities: We may disclose health information about you to authorized federal officials for intelligence, counterintelligence and other national security activities authorized by law.

Inmates: If you are an inmate of a correctional institution or under custody of a law enforcement official, we may disclose health information about you to the correctional institution or the law enforcement official. This is necessary for the correctional institution to provide you with health care, to protect your health and safety and the health and safety of others, and to protect the safety and security of the correctional institution.

Legal Requirements: We will disclose health information about you without your permission when required to do so by federal or California law.

With Your Verbal Agreement

Individuals Involved in Your Care or Payment for Your Care: With your verbal agreement, we may disclose health information about you to a family member or friend who is involved in your medical care. In addition, we may disclose health information about you to an entity assisting in a disaster relief effort (such as the Red Cross) so that your family can be notified about your condition, status and location.

Directory Information: Each Sharp HealthCare hospital has a "directory" of limited information about currently hospitalized patients available to anyone who asks for a patient by name. The directory information includes four items: (1) patient name, (2) location, (3) general condition (undetermined, good, fair, serious, critical), and (4) religious affiliation (available to clergy only). Directory information allows visitors to find your room and florists to deliver flowers to you. You will be asked to agree to have all or part of this information included in the directory each time you come to a Sharp HealthCare hospital. If you refuse to have your information included in the directory, we will not be able to reveal your presence or your location in the hospital to your family or friends.

Situations Requiring Your Written Authorization

If there are reasons we need to use your information that have not been described in the sections above, we will obtain your written permission. This permission is described as a written "authorization." If you authorize us to use or disclose health information about you, you may revoke that authorization in writing at any time. If you revoke your authorization, we will no longer use or disclose health information about you for the reasons stated in your written authorization. Please understand that we are unable to take back any disclosures we have already made with your permission, and we are required to retain our records of the care we provide to you. Some typical disclosures that require your authorization are:

Special Categories of Treatment Information: Sharp HealthCare follows applicable federal and California privacy laws. Except where required or permitted by those laws, we will only release the following types of information with your (or your representative's) written signature:

- disclosures of drug and alcohol abuse treatment,
- Human Immunodeficiency Virus (HIV) and Acquired Immune Deficiency Syndrome (AIDS) test results, and
- mental health treatment.

Research That Requires Individual Consent: Except as provided by law, we may disclose your health information to researchers only after you have signed a specific written authorization. In addition, an Institutional Review Board (IRB) will already have reviewed the research proposal, established appropriate procedures to ensure the privacy of your health information and approved the research. You do not have to sign the authorization. However, if you refuse, you cannot be part of the research study and may be denied research-related treatment.

Marketing: Under most circumstances, we will obtain your authorization for Sharp HealthCare related marketing activities. Exceptions include direct face-to-face communication, if we give you a gift that is of nominal value, or if the marketing activity is to provide you with information about Sharp HealthCare's treatment options or services.

Your Rights Regarding Health Information About You

You have the following rights regarding health information we maintain about you. You may contact a health information representative where services were provided to obtain additional information and instructions for exercising the following rights.

You have the right to:

1. **Obtain a copy of Sharp HealthCare's Notice of Privacy Practices.**
2. **Request a restriction on certain uses and disclosures of your information.** This request must be in writing. We are not required to agree to your request. We will not agree to any requests if it would affect your quality of care or if we are not able to do so. If we agree to your request, we will comply with your request unless the information is needed to provide you with emergency treatment. In addition, if you pay for services or a healthcare item out-of-pocket and in full, you may request that we not disclose that information for the purpose of payment or our operations with your health insurer. We can only address requests for Sharp HealthCare's affiliated entities. Your request will not extend to a physician's private practice.
3. **Inspect and request a copy of your health record.** This request for inspection or copies must be in writing and directed to the Sharp HealthCare entity where services were provided. A reasonable fee for copies will be charged. We may deny your request under limited circumstances. If you are denied access to health information, you may request that the denial be reviewed by another health care professional chosen by someone on our health care team. Sharp HealthCare will abide by the outcome of that review.
4. **Request an amendment to your health record if you feel the information is incorrect or incomplete.** Your request must be made in writing and it must include a reason that supports the request. We may deny your request if the information was not created by our health care team, if it is not part of the information kept by our entity, if it is not part of the information which you are permitted to inspect and copy, or if the information is accurate and complete as stated. **Please note:** If we accept your request for amendment, we are not required to delete any information from your health record.
5. **Obtain an accounting of disclosures to others of your health information.** The accounting will provide information about disclosures made for purposes *other than* treatment, payment, health care operations, disclosures excluded by law or those you have authorized.
6. **Request confidential communications.** You have the right to request that we communicate with you about health issues in a certain way or at a certain location. For example, you may ask that we only contact you at work or by mail. We will accommodate all requests that are reasonable based on our system capabilities. Your request must be in writing and specify the exact changes you are requesting.

7. **Revoke your authorization.** You have the right to revoke your authorization for the use or disclosure of your health information except to the extent that action has already been taken.
8. **Complain about any aspect of our health information practices to us or to the United States Department of Health and Human Services.** If you have complaints or concerns about this notice or how Sharp HealthCare handles your health information, you should contact the Sharp HealthCare Vice President of Corporate Compliance, 8695 Spectrum Center Blvd., San Diego, CA 92123. There will be no retaliation against you if you file a complaint with Sharp HealthCare. You also may submit a formal complaint in writing to the Office of Civil Rights, Department of Health and Human Services.

Sharp HealthCare Affiliated Entities

Sharp HealthCare
Sharp Chula Vista Medical Center
Sharp Coronado Hospital and Healthcare Center
Sharp Grossmont Hospital
Sharp Mary Birch Hospital for Women & Newborns

Sharp Memorial Hospital
Sharp Mesa Vista Hospital
Sharp McDonald Center
Sharp Rees-Stealy Medical Centers

Contact the Vice President of Corporate Compliance at 1-800-82-SHARP if you have questions about this Notice of Privacy Practices.

2.8 Additional Information as required Exhibit B

Policy: Notice of Privacy Practices Attachment B: Notice of Privacy Practices, Mandatory Elements

ATTACHMENT B

Notice of Privacy Practice, Mandatory Elements

1. **Header.** The header must contain the following statement: **"This Notice Describes How Medical Information About You May Be Used And Disclosed And How You Can Get Access To This Information. Please Review It Carefully."**
2. **Uses and Disclosures.** A description, including at least one example of the types of usage and disclosures that is permitted for the purposes of treatment, payment and health care operations.
 - a. A description of each of the other purposes for which Sharp is permitted or required to use protected health information without the individual's written authorization.
 - b. Patients will be advised to circumstances where California law is more stringent than the Notice advises.
 - c. For each purpose, the descriptions must include sufficient detail to place the individual on notice of how Sharp uses and discloses their information.
 - d. A statement that other uses and disclosures will be made only with the individual's written authorization and the individual may revoke their authorization at any time.
 - e. Sharp may contact the individual to provide appointment reminders or information about treatment alternatives or other health related benefits and services that may be of interest to the patient.
3. **Separate Statements for Certain Uses and Disclosures**
 - a. A statement that we can use protected health information for our fundraising, but patients may choose not to receive these communications by opting out.
 - b. (Health Plan Requirements).
4. **Individual Rights:**
 - a. The right to request restriction. Sharp has the right to refuse the request, unless disclosure is required by law. If the patient pays for a service or health care item out-of-pocket in full, we will honor their request, unless a law requires us to share that information.
 - b. The right to receive confidential communication.
 - c. The right to inspect and copy protected health information.
 - d. The right to amend protected health information.
 - e. The right to receive an accounting of disclosures of protected health information.
 - f. The right to obtain a paper copy of the Notice.
5. **Sharp's Responsibilities:**
 - a. Statement "Sharp is required by law to maintain the privacy of protected health information, to provide individuals with notice of its legal duties and privacy practices with respect to protected health information, and to notify affected individuals following a breach of unsecured health information."
 - b. Statement "Sharp is required to abide by the terms of the notice currently in effect."
 - c. Statement "Sharp reserves the right to change its privacy practice and the new notice will be effective for all protected health information that Sharp maintains. Sharp will provide patients with the new revised notice."
6. **Complaints.** A statement indicating how patients may complain to Sharp and to the Secretary of the Department of Health and Human Services. A description of how the individual may file a complaint with Sharp and a statement that individual will not be retaliated against for filing a complaint.
7. **Contact.** A notice must contain the title and telephone number of the Sharp V.P. of Corporate Compliance.
8. **Effective Date.** The effective date on which the Notice is in effect.

2.8 Additional Information as required Exhibit B

Policy: Notice of Privacy Practices Attachment C: Request for Restriction on Use or Disclosure of Information Form

SHARP			REQUEST FOR RESTRICTION ON USE OR DISCLOSURE OF PROTECTED HEALTH INFORMATION		
Date: _____			Patient Name: _____		
			(LAST)		(FIRST) (M.I.)
Address: _____					
Telephone: _____					
Date of Birth: _____					
I understand that Sharp HealthCare may use or disclose my protected health information ("PHI") for the purposes of treatment, payment and health care operations. Sharp HealthCare may also disclose information to someone involved in my care or the payment for my care, such as a family member or friend. I hereby request a restriction on Sharp HealthCare's use or disclosure of my PHI. I understand that Sharp HealthCare does not have to agree to my request unless the restriction is required by law.					
I want to limit:					
☐ Sharp HealthCare's use of this information					
☐ Sharp HealthCare's disclosure of this information					
☐ Both the use and the disclosure of this information					
I want to restrict disclosure of my PHI because:					
☐ I paid for a service or health care item out-of-pocket in full					
☐ Other _____					
I want the limits to apply to the following person/entity (for example: a spouse, insurance company):					

(Full name and address)					
The information that I want restricted is:					
☐ Treatment Notes		☐ Imaging Reports		☐ Laboratory Tests	
☐ Emergency Dept. Reports		☐ Procedure/Operative Notes		☐ Billing Information	
☐ Other _____					
Date: _____		_____			
		Signature of Patient or Legal Representative			
If Legal Representative, state relationship: _____					
Date: _____		_____			
		Signature of Witness			
*** FOR INTERNAL USE ONLY *** Provide a copy of this form to patient upon request.					

SHC-MR-1997-NS (Rev. 9-21-15)

2.8 Additional Information as required Exhibit B

Policy: Notice of Privacy Practices Attachment D: Request for Restriction on the Method of Communicating Information

SHARP	REQUEST FOR RESTRICTION ON THE METHOD OF COMMUNICATING INFORMATION
Name: _____ (LAST) (FIRST) (M.I.)	Date: _____
Address: _____	
Telephone: _____	
Date of Birth: _____	Social Security #: _____ (OPTIONAL)
You may request to receive confidential communications of protected health information by an alternative means or at an alternative address.	
All reasonable requests will be accommodated.	
If you make a special request for restriction, you must provide an alternative address or other method of contacting you. Please select one of the following options:	
☐ Fax Number (work): _____	
☐ Fax Number (home): _____	
☐ Alternate Telephone Number: _____	
☐ Alternate Address: _____ _____	
Date: _____	_____ Signature of Patient or Legal Representative
If Legal Representative, state relationship: _____	
Date: _____	_____ Signature of Witness
*** FOR INTERNAL USE ONLY: *** Provide a copy of this form to patient upon request.	

2.8 Additional Information as required Exhibit B

Policy: Notice of Privacy Practices Attachment E: Response to Request for Restrictions

SHARP RESPONSE TO REQUEST FOR RESTRICTIONS

Date: _____

Name: _____

Address: _____

On _____, you requested that Sharp HealthCare restrict your information for one of the
DATE
following reasons:

☐ Use and Disclosure of Protected Health Information (PHI)

☐ Confidential Communication

☐ Sharp HealthCare agrees to the restriction you requested.

☐ Sharp HealthCare does not agree to the restriction you requested.

☐ Other _____

Even if Sharp agrees to your request, the information may still be shared in the following circumstances:

- During a medical emergency, if the restricted information is needed to provide emergency treatment. However, if the information is disclosed during an emergency, Sharp HealthCare will tell the recipient not to use or disclose it for any other purposes.
- Required public health reporting.
- For reporting abuse, neglect, domestic violence or other crimes.
- For health agency oversight activities or law enforcement investigations.
- For judicial or administrative proceedings.
- For identifying decedents to coroner and medical examiners or determining a cause of death.

If a special restriction is agreed to, it may be terminated if:

- You request, or agree to, the termination in writing.
- You orally agree to the termination and the oral agreement is documented.
- Sharp HealthCare informs you that it is terminating the agreement. In this case, the termination is only effective for PHI created by Sharp or received by Sharp after you are notified of the termination.

Sincerely,

SIGNATURE OF SHARP REPRESENTATIVE

DEPARTMENT

SHARP ENTITY

SHC-MR-2001-NS (Rev. 9-25-15)

2.8 Additional Information as required Exhibit B

Policy: Notice of Privacy Practices Attachment F: Termination of Restriction



TERMINATION OF RESTRICTION

Date: _____

Patient Name: _____

The patient named above requested a restriction on the use or disclosure of protected health information on (Date) _____

☐ The patient hereby requests that the restriction be terminated.

Signature: _____
(Patient/Legal Representative)

If signed by someone other than patient, indicate relationship: _____

Print Name: _____
(Legal Representative)

☐ The patient hereby agrees to the termination of restriction.

Signature: _____
(Patient/Legal Representative)

If signed by someone other than patient, indicate relationship: _____

Print Name: _____
(Legal Representative)

☐ The patient or legal representative orally agreed to the termination.

Signature: _____
(Hospital Representative who witnessed the oral agreement)

Print Name: _____
(Legal Representative)

☐ [Insert Hospital Name] _____ is hereby informing you that the agreement is terminated. The termination is effective only with respect to PHI created or received by us after you have received this notification.

Date: _____ Time: _____ AM/PM

Signature: _____
(Hospital Representative)

Print Name: _____
(Hospital Representative)

2.8 Additional Information as required Exhibit B:

E. 2 Requirements Overview: Medical Provider Network (MPN) Requirements

Refer to Attachment B, page 137

2.8 Additional Information as required Exhibit B:

E. 5 Requirements Overview: Medical Provider Network (MPN) Requirements

Refer to Attachment C, page 142

2.8 Additional Information as required Exhibit B:

G. 1 Qualification & Experience: PA Licenses

Refer to Tab A, section 2.6, page 31

2.8 Additional Information as required Exhibit B:

G.4 Qualifications & Experience: Name and Qualifications of all Employees Who Will Be Involved in Providing Audiometric and Respiratory Fitness Examinations

Occupational Medicine Physicians:

Stephen W. Munday, MD, MPH, MS, Medical Director

Dr. Munday completed his bachelor degree in biology at the University of Florida in 1983 followed by his M.D. degree at the University of Florida in 1987. He then completed an Internal Medicine internship at Naval Hospital Oakland, California in 1988. He completed a Public Health/General Preventive Medicine residency at UCSD in 1995, including an MPH in Occupational Health from SDSU. He then completed an Occupational and Environmental Medicine residency and Master of Science in Environmental Toxicology at UC Irvine. He completed a Medical Toxicology fellowship at the University of California, San Diego in 2002. Dr. Munday is Board Certified in Occupational Medicine, Public Health/General Preventive Medicine, and Medical Toxicology. He is also trained in Travel Medicine. He has been with Sharp Rees-Stealy Medical Group since 1994 and has been practicing Occupational Medicine for over 35 years. In addition to being Chair of the Sharp Rees-Stealy Occupational Medicine Department, he is also the Chief Medical Toxicologist and Medical Director of Epidemiology.

Kathy Lynn Head, MD, JD, MPH

Dr. Head received her Bachelor of Science Degree from the University of New Mexico in 1987 with distinction. She then completed a Juris Doctor Degree at Tulane Law School graduating Cum Laude in 1990, followed by a Medical Degree from the University of New Mexico in May 1995. She took an internship in Internal Medicine at Santa Barbara County Hospital in Santa Barbara, California in 1995. She then completed a residency in Occupational Medicine at the University of Southern California in 1998. She is Boarded in Occupational Medicine and has published articles on Emergency Medical Healthcare. Dr. Head joined Sharp Rees-Stealy in 1998. Dr. Head has served as an Associate Director at the Chula Vista, Sorrento Mesa, and Genesee Sharp Rees-Stealy Occupational Medicine sites during her tenure and is now the Associate Director of the Rancho Bernardo site since 2020. Dr. Head also serves as the Assistant Chair of the Occupational Medicine Department.

Haewon Lee, MD, FAAPMR

Dr. Lee received her Bachelor of Arts degree with a major in English Literature from Barnard College, and her Medical Degree at Rutgers-New Jersey Medical School. Dr. Lee then completed her internship and residency in Physical Medicine & Rehabilitation at the University of Pennsylvania, where she also completed her fellowship in Interventional

Spine & Musculoskeletal Sports Medicine. After several years of practicing and teaching Interventional Spine and Physical Medicine, she joined Sharp-Rees Stealy Medical Group in 2025.

Anthony Castillo Biascan, MD

Dr. Biascan received his Bachelor of Science Degree in Biochemistry from Loyola Marymount University, Los Angeles in 1992. He graduated and received his Medical Degree from Creighton University School of Medicine in 2000. Dr. Biascan was commissioned an Officer the United States Navy and completed a Family Medicine internship at Naval Hospital Pensacola in 2001. Following internship, he served as a Naval Flight Surgeon for nine years, caring for men and women in the Navy, Army, Air Force, and Marine Corps. Dr. Biascan then accepted an Occupational Medicine residency offered by the US Navy and completed a 2-year full time out service training at the University of California, Irvine where he also received a Master in Environmental Toxicology. Dr. Biascan went on to serve two tours as an Occupational Medicine physician at Naval Hospital Sigonella, Sicily and Marine Corps Air-Ground Combat Center, Twentynine Palms, retiring honorably from active-duty service in 2020. He transitioned into the civilian world in 2020, first with the Center for Occupational and Environmental Health - University of San Diego and is now currently with the Sharp Rees-Stealy team since July 2023. Dr. Biascan has over 25 years of experience in practicing both military and civilian Occupational and Environmental Medicine.

Timothy Lawler, DO, MPH

Dr. Lawler received his Bachelor of Science degree, with a major in Chemistry and minor in Spanish, from Rockhurst University in 2005. He then completed his Medicine degree from Kansas City University of Medicine and Bioscience – College of Osteopathic Medicine in 2008. After medical school, Dr. Lawler joined the United States Navy, completing a Transitional Internship at Naval Medical Center San Diego in 2009. After his internship, he served as a Naval Flight Surgeon, caring for men and women in the Navy and Marine Corps, completing deployments to Afghanistan and various areas throughout the Pacific Ocean. Dr. Lawler then transitioned into the civilian world in 2013 to complete his Master in Public Health – with emphasis in Health Promotion – from National University in 2017. Finally, he completed his residency in Occupational and Environmental Medicine from the University of Pennsylvania in 2019, joining the Sharp Rees-Stealy team in July 2019. Dr. Lawler has over 13 years of experience in practicing both military and civilian Occupational and Environmental Medicine.

Ashely Ennedy, DO, MPH

Dr. Ennedy completed her residency in Occupational Medicine at Loma Linda University Medical Center in Loma Linda, CA and her medical internship at Broward Health Medical Center in Fort Lauderdale, FL. She received her BS degree in Physiology and Neuroscience from the University of California in San Diego, CA. Dr. Ennedy will be sitting for her Occupational Medicine boards soon. Dr. Ennedy joined Sharp Rees-Stealy Medical Group in 2020 and is the Associate Medical Director for the Occupational Medicine department at the Sorrento Mesa location.

Tiffany Shay-Alexander, MD

Dr. Shay received her Bachelor of Science Degree from the University of California San Diego in 1992, Cum Laude. She graduated and received her Medical Degree from Indiana University School of Medicine in 1997. Dr. Shay returned to California to do an internship at San Bernardino County Medical Center in 1998. She then completed residency in Occupational and Environmental Health and received a Master of Science degree in Toxicology at the University of California, Irvine in 2001. Dr. Shay also has an additional year of training in Physical Medicine and Rehabilitation from the University of California, Irvine. Dr. Shay is Board Certified in Occupational/Environmental Health as well as in Preventive Medicine. She joined Sharp Rees-Stealy Medical Group in 2001.

Stephen Allan, PA-C

Mr. Allan received his Bachelor of Science from Brigham Young University in Provo, Utah. He then attended and graduated from the Arizona School of Health Sciences with a Master Degree in Physician Assistant Studies. He obtained national certification after his graduation in 2013. Mr. Allan started his career in Scottsdale Arizona with the surgical specialty of Urology as well as Family Medicine. He relocated to San Diego in 2016 to begin his career with Sharp Rees-Stealy in the Occupational Medicine department.

Zerla Stoller, PA-C

Zerla Stoller earned her Bachelor of Science in Biology from San Diego State University before completing her Master degree in Physician Assistant Studies at Western University of Health Sciences in 2005. She began practicing Occupational Medicine at Sharp Rees-Stealy in 2006 where she continues to provide comprehensive care. Over the course of her career, she gained extensive experience in Urgent Care serving patients for seven years, and in Women's Health, where she dedicated nine years to supporting women across various stages of life.

Erik Poast, PA-C

Mr. Poast received his Bachelor of Science from the University of Colorado at Boulder, CO. He received his Physician Assistant certification in 2011 where he graduated from Nova Southeastern University. He then worked in a pain clinic until 2014 and began the next stage of his career in Workers' Compensation. Erik joined the Occupational Medicine Department at Sharp Rees-Stealy Medical Group in 2015. He holds certifications in ACLS and PALS.

Dolly Ricafort, PA-C

Ms. Ricafort completed her Bachelor of Science degree with honors from University of Houston in Texas. She then graduated with her Master of Science degree in Physician Assistant Studies from Western University of Health Science in Pomona, California and earned her NCCPA certificate in 2005 immediately after graduating. She completed some of her training in San Francisco and Los Angeles for Orthopedics, Cardiology, and Emergency Medicine. She established her career in Family Medicine and OB/GYN

specialty in Los Angeles before relocating to San Diego, CA. With her interest in Musculoskeletal Medicine and her eagerness to optimize her profession as a certified Physician Assistant, she acquired a job in Occupational Medicine with Sharp Rees-Stealy in 2012.

Steven Shevlin, PA-C

Mr. Shevlin began his medical career in 1980 as an EMT in 1991. Mr. Shevlin joined Sharp Rees-Stealy working in the x-ray department as part of the support team. During his time with SRSMSG he attended night school to fulfill the prerequisites necessary to apply for Physician Assistant school. Mr. Shevlin then graduated from RCRMC/RCC as a Physician Assistant in 2005 and earned his NCCPA (National Certification) in 2005, followed by an Orthopedic Surgery fellowship for PAs at Watauga Orthopedics in Tennessee. Mr. Shevlin returned to the SRSMSG family in 2007 with the Orthopedic Department, then in 2014 joined the Occupational Medicine department.

Justin Judilla, PA-C

Mr. Judilla completed his Bachelor of Science degree from California State University of Long Beach majoring in Kinesiology and Exercise Science in 2018. He then began his direct patient care experience working as a medical assistant in Occupational Medicine and Urgent Care at Sharp Rees-Stealy. He continued his medical career and pursued his Master of Science degree in Physician Assistant Studies from Drexel University in Philadelphia, California in 2023. After successfully passing his national certification examination, he began his first job as a new grad PA-C returning to Occupational Medicine and joining the Sharp Rees-Stealy Medical Group Family in 2023.

Tiffany Nguyen, PA-C, MPH:

Ms. Nguyen received her Bachelor degree with honors at the University of California, San Diego. She continued her graduate studies at Touro University in Northern California and completed a dual Master degree program in Physician Assistant Studies and Public Health. She joined the Occupational Medicine Department at Sharp Rees-Stealy Medical Group in 2023.

Phil Miller, PA-C

Mr. Miller began his medical career in 1986 in the US Navy as a Hospital Corpman. He increased his experience and training through various schools within the Navy, attended college as time permitted completing multiple shipboard deployments providing quality care to the men and women of our Armed Forces in various environments and roles. He completed his Bachelor of Science degree through the Interservice Procurement Program accredited through the University of Nebraska in 2008. He then completed his Master of Science in Physician Assistant Studies in 2009 through the same program. He gained increased experience through multiple deployments to the Middle East with the Navy and the Marines. Upon retirement, he spent 14 of his 37 years of honorable service as a Physician Assistant. He sought to put his experience with occupational injuries to use by joining the Occupational Medicine department at Sharp-Rees Stealy in September 2023.

Catherine Sundloff PA-C

Ms. Sundloff received her Bachelor of Science degree from New York University in 2013. In 2017 she received her Master of Science in Physician Assistant Studies from South University in her home state of Georgia. She became board certified in 2017. She relocated to California where she began her career in Family Medicine. Her clinical experience also includes Urgent Care, Internal Medicine, and contracting work for VA Compensation and Pension exams.

Administration:

Cheri Pope, MBA, MHA Director of Occupational Medicine and Urgent Care

Ms. Pope is the Director for Sharp Rees-Stealy Medical Center's Occupational Health Services and Urgent Care Departments which provide services to patients, employers, insurance carriers, attorneys, employees, and other customers. Her extensive background in healthcare began while she served as a Hospital Corpsman in the United States Navy. After completing her military service, Ms. Pope joined Sharp Rees-Stealy in 1995 where she utilized her military experience and knowledge of healthcare to serve the community of San Diego. She provides oversight of all administrative and other non-physician operations for the Occupational Medicine and Urgent Care Departments including but not limited to administrative and clinical staff, nursing protocols, billing, specialty care, customer service, and marketing. Ms. Pope's leadership and credo of Patient Safety, Quality Care, and Service Excellence is the driving force of Sharp Rees-Stealy Occupational Medicine.

Yvonne Casanova Zazueta, MHA, Manager Site Operations

Yvonne is a seasoned healthcare leader with over 25 years of experience in healthcare. Six of those 25 years have been in Occupational Medicine. Leader with a distinguished career leading operations in healthcare organizations, adept at driving patient-centered initiatives and enhancing service delivery across multiple clinics. Excels in orchestrating strategic planning and process improvements in Occupational Medicine, significantly elevating patient satisfaction. Versed in lean principles to optimize efficiency and productivity, with proven ability to implement training programs that foster culture of excellence and compassion. Possesses strong aptitude for developing successful strategies addressing social determinants of health, improving patient experience, operational excellence and health outcomes. Committed to advancing organizational goals with passion for learning and deep operational understanding in all facets of healthcare management.

Billing Office:

Valerie Sarmiento, CPC is the lead for the Occupational Medicine Billing Office for workers' compensation and client-based services as well as coding related billing and collections for non-Occupational Medicine related lines of business for Sharp Rees-Stealy Medical Group. She has over 32 years of experience in healthcare with 17 of these years with Sharp HealthCare, 9 of which lead in Occupational Medicine. She oversees 6 Occupational Medicine billing and collection analysts and 7 non-Occupational Medicine. Collectively

has over 16 years of Workers Compensation billing experience – including coding rejections for government and non-government payers.

Catherine Goodwater, Supervisor Occupational Medicine Administration

Catherine Goodwater, BHC, LVN, has 29 years of experience here at Sharp Rees-Stealy, bringing extensive experience across multiple areas of healthcare. She has 12 years' experience in Clinical Research, 7 years' experience in Primary Care (including 5 years as lead), and 10 years' experience in total with Occupational Medicine. Currently, she serves as Supervisor of the Occupational Medicine Administration Service team, overseeing a diverse team that includes five case coordinators, two transcriptionists, two authorization assistants, one company accounts coordinator, one claims acquisitions, and two specialty care coordinators: one's specialty is Sharp Link, and one's specialty is training new employees, and one Administrator Assistant who specializes in urine drug protocol and training.

Authorization Assistants:

Monishia Price is case coordinator and claims assistant who has been with Sharp Rees-Stealy Occupational Medicine since 2022, with a focus on patient support and claims management.

Jazzmin Strong began her healthcare career in 2014, working as a Phlebotomist and Lab Assistant at Sentara Norfolk General Hospital and Sentara Leigh Hospital in Virginia. In 2021 she relocated to California and joined Sharp Rees-Stealy, initially working in the flu clinic before transitioning to her current role as an Authorization Assistant in Occupational Medicine. Her expertise lies in processing Requests for Authorization (RFAs) for workers' compensation cases. In addition to her primary responsibilities, Jazzmin supports our Case Coordinators with various departmental needs. She brings a strong clinical foundation, along with exceptional adaptability, attention to detail, and a commitment to delivering efficient patient care services.

Transcription:

Kimberly Cate has been a Transcriptionist/editor for 25 years here in the Sharp Rees-Stealy Occupational Medicine department.

Pat Mcnamara has been a Transcriptionist/editor for 26 years here in the Sharp Rees-Stealy Occupational Medicine department.

Occ Health Administrative Support Coordinator:

Carolyn Souhrada Wall has been the Administrative Assistant for 35 years in the Sharp Rees-Stealy Occupational Medicine department. She helps coordinate and maintain our urine drug screen program and training.

Claim acquisitions:

Shontel Tudman has been with Sharp Rees-Stealy Occupational Medicine for 25 years. She is responsible for contacting insurance companies and/or employers to obtain claim numbers for injured workers, as well as gathering adjuster information.

Case Coordinators:

Roxann Pena has been with Sharp Rees Stealy for 37. She has extensive experience as a patient service representative and has worked as a Case Coordinator in Sharp Rees-Stealy Occupational Medicine. She manages all workers' compensation referrals.

Sandra Ascencio has been with Sharp Rees-Stealy for 10 years in Occupational Medicine and currently serves as an Occupational Health Case Coordinator. She possesses certifications in Medical Office Administration, Medical Assistant, and Associates of Applied Science in Healthcare Administration.

Vanessa Miranda Soto has been with Sharp Rees-Stealy for 3 years in Occupational Medicine and currently serves as a Case Coordinator in the Sharp Occupational Medicine department. Vanessa began her career as a Patient Service Representative and transitioned into her Case Coordinator role one year ago.

Grace Buerstetta has been a Sharp Rees-Stealy Occupational Medicine Case Coordinator for 8 years, managing all workers' compensation referrals.

Jonathan Pentecostes has 26 years' experience in healthcare, 19 of them with Sharp Rees-Stealy. He has worked at Sharp Rees-Stealy Occupational Medicine as a Case Coordinator for 5 years. He processes referrals/RFA's requested by providers, assists nurse Case Managers, Claims Adjusters and insurance carriers with various needs. He is also a certified Medical Assistant.

Company Accounts Coordinator:

Krystal Lopez has been with Sharp Rees-Stealy Occupational Medicine for 3 years. She is responsible for setting up new company accounts, providing pricing for services, and collecting workers' compensation insurance carrier information.

Specialty Care Case Coordinator/Educators:

Cathy Simmerman has been with Sharp Rees-Stealy Occupational Medicine for 30 years. Over the course of her tenure, she has served in various roles including Patient Services Representative, Supervisor, and Case Coordinator. Currently, she manages the Sharp Link portal, where she oversees account setup, password resets, and provides training on portal access.

Elsa Portillo has dedicated 28 years to Sharp Rees-Stealy Occupational Medicine, where she currently serves as the Specialty Care Case Coordinator. In this role she facilitates referrals to specialty care and maintains the MPN list. Elsa also plays a key role in onboarding and training all new employees in Occupational Medicine processes.

Occupational Medicine Support Staff:

All support staff are trained in the procedural and reporting requirements. Many of the 100 support staff in the Sharp Rees-Stealy Occupational Medicine program have taken IEA courses; Basic Workers' Compensation and/or Medical Terminology. All occupational RNs, LVNs, Medical Technologists and Medical Assistants must maintain licensure and/or certification. RNs, LVNs and Medical Assistants are certified for the following: CPR - Basic Life Support, NIOSH Certification Pulmonary Function Testing, and CAOCH Certification Audiometric Testing. The average amount of Occupational Medicine experience from this talented team is 22 years.

Occupational Health Site Supervisor - The Occupational Health site supervisor is responsible for overall office operations at each site. Non-clinical questions are referred to the supervisor for resolution, including first and supplemental reports, authorizations for specialist treatment, scheduling, and other miscellaneous items.

Case Management Coordinator - The Specialty Care Coordinator is responsible for the review of medical specialty reports. It is the coordinator's responsibility to assist with proper report analysis, disability evaluation, and formats. The Case Management Coordinator is also available to assist with problem solving complex cases for the requesting claims adjuster.

Occupational Health Patient Services Representative - The Occupational Health receptionist receives all call-in and walk-in patients. He/she schedules appointments and ensures paperwork is completed as necessary.

Occupational Health Nurse/Medical Assistant - The Occupational Health Nurse/ Medical Assistant assists the physician with all clinical patient services. He/she is also responsible for obtaining authorization for treatment and ensuring efficient patient flow in the clinic.

Occupational Health Information Management Representative – This person is responsible for maintaining and managing all patient records. He/she is also responsible for responding to record requests by clients and physicians.

Chula Vista Occupational Medicine - The Sharp Rees-Stealy, Chula Vista Occupational Medicine supervisor is Deborah Flores. Ms. Flores has 38 years of employment with Sharp HealthCare and 36 years of experience in Occupational Medicine. Debbie also completed the IEA course in Basic Worker's Compensation.

Downtown Occupational Medicine - Joy David, supervisor of Downtown and the Occupational Medicine Float Pool, began her career in healthcare in 2007 and joined Sharp Rees-Stealy in 2013 as a float for the Occupational Medicine department. She is certified in PFT, DOT Urine Drug Screening/Breath Alcohol Testing, Hair Collection, CPR, and is an occupational hearing conservationist through CAOHC. She is also cross trained in front desk (Patient Service Representative) job functions.

Genesee Occupational Medicine - The Sharp Rees-Stealy Genesee Occupational Medicine supervisor is Michelle Ragadio-Guzman. Michelle started in 1999 as a Medical Assistant and has worked solely in the Occupational Medicine department, floating to all 6 locations. She is trained in Pulmonary Function Testing, certified in DOT Urine Drug Screening/Breath Alcohol Testing, Hair Collection, CPR and e-SCREEN. In addition, she is cross trained as an Occupational Medicine service representative (receptionist) and experienced with the work comp referral/authorization process. She became the Clinical Staff Coordinator in 2012 and moved on to her supervisory role in 2013.

La Mesa Occupational Medicine - The Occupational Medicine site supervisor for the Sharp Rees-Stealy La Mesa-GMP facility is Jacqueline Hollins. She has 35 years' experience in Occupational Medicine and a total of 33 years in healthcare - all with Sharp Rees-Stealy. She is cross trained for the front office (patient service representative) and has Health Information Management Experience.

Sorrento Mesa Occupational Medicine - Michelle Ragadio-Guzman is the Occupational Medicine site supervisor for the Sorrento Mesa location. Michelle started in 1999 as a Medical Assistant and has worked solely in the Occupational Medicine Department floating to all 6 locations. She is trained in pulmonary function testing, DOT Urine Drug Screening/Breath Alcohol Testing, Hair Collection, CPR, and e-SCREEN. In addition, she is cross trained as an Occupational Medicine service representative (receptionist) and experienced with the work comp referral/authorization process. She became the Clinical Staff Coordinator in 2012 and moved on to her supervisory role in 2013.

Rancho Bernardo Occupational Medicine - The Occupational Medicine site supervisor for the Sharp Rees-Stealy La Mesa-GMP facility is Jacqueline Hollins. She has 35 years' experience in Occupational Medicine and a total of 33 years in healthcare - all with Sharp Rees-Stealy. She is cross trained for the front office (patient service representative) and has Health Information Management Experience.

Sales and Marketing - Marlene Mead, Occupational Health Account Manager, has been with Sharp Rees-Stealy Occupational Medicine since 1992. Throughout her career with Sharp Rees-Stealy Occupational Medicine, she coordinated clinic services and supervised operational activities at all of our six locations. She joined the Sales and Marketing division in 2004 to lend her extensive experience in Occupational Medicine.

Proposer must include the names and qualifications of all employees who will be involved in providing audiometric and respiratory fitness examinations. The Employees' experience in providing these or other similar services must also be included in a statement of qualifications.

Sharp Rees-Stealy is fortunate to have a team of professionals who have extensive experience and history of providing audiometric and respiratory fitness examinations.

Shari Fortin, Services-On-Site Coordinator, has 30+ years of experience in Occupational Medicine and is a clinical Medical Assistant. Aside from her certifications in CAOHC, PFT, Phlebotomy, BAT and UDS, she has recently been certified to perform Ergonomic evaluations including Lift Testing. She manages and coordinates the Services-On-Site Program, which delivers large scale health services on site at the employers' or carriers' request. Major clients include but not limited to various Police and Fire Departments within San Diego County, The Scripps Research Institute, and the Catholic Diocese of San Diego. The Services-On-Site program team consists of one Medical Doctor who is supported by clinical Medical Assistants and Registered Nurses.

Victoria Munoz, Clinical Medical Assistant, has 26 years' experience in healthcare. She joined Sharp Rees-Stealy Occupational Medicine in 2006, is certified in CAOHC, BAT, PFT, UDS, CPR, and is fluent in Spanish. She is the Clinical Staff Coordinator at the Chula Vista site and handles clinical issues in the absence of the supervisor.

Julia Tavakoli, Clinical Medical Assistant, has 10 years of healthcare experience. She has been a Clinical Medical Assistant in Occupational Medicine since 2015 and has certifications in PFT, UDS, BAT, CAOHC, and CPR. She is also fluent in Spanish.

Norma Medina, Clinical Medical Assistant, has 22 years of healthcare experience. She has been a Clinical Medical Assistant in Sharp Rees-Stealy Occupational Medicine since 2022 and has certifications in PFT, UDS, BAT, CAOHC, and CPR. She is also fluent in Spanish.

Carlos Angulo Peraza, Clinical Medical Assistant, has 10 years of healthcare experience. He has been a Clinical Medical Assistant at Sharp Rees-Stealy Occupational Medicine since 2019 and has certifications in PFT, UDS, BAT, CAOHC, Medical Billing Coder, and CPR. He is also fluent in Spanish.

Rosenda Casares, Clinical Medical Assistant, has 5 years of healthcare experience. She has been a Clinical Medical Assistant at Sharp Rees-Stealy Occupational Medicine since April 2025 and has certifications in PFT, UDS, BAT, CAOHC, and CPR. She is also fluent in Spanish.

Jessie Robertson, Clinical Medical Assistant, has 14 years of experience in Occupational Medicine. She has certifications in CAOHC, PFT, UDS, BAT, and CPR. She is the Clinical

Staff Coordinator at the Kearny Mesa site and handles clinical issues in the absence of the supervisor.

Susan Manabat is a Clinical Medical Assistant. She joined Sharp Rees-Stealy Occupational Medicine in 2014 and has certifications in PFT, UDS, BAT, CAOHC, and CPR.

Barbara Smith is a Clinical Medical Assistant and has been in healthcare for over 40 years, over half specifically in Occupational Medicine. She holds certifications in CAOHC, BAT, UDS, PFT, Phlebotomy, Travel Medicine, and CPR. She is the Clinical Staff Coordinator at the Kearny Mesa site and handles clinical issues in the absence of the supervisor.

Esther Rivera is a Clinical Medical Assistant and has been with Sharp HealthCare for 31 years. She has certifications in DOT Urine Collection, DOT Alcohol Collection, CPR, and Audio through CAOHC. She can perform hair/saliva collection for drug/alcohol testing and Pulmonary Function Tests. She is also fluent in Spanish.

Mayel Merodio is a Clinical Medical Assistant and has been with Sharp HealthCare for over 1 year. She has certifications in DOT Urine Collection, DOT Alcohol Collection, CPR, and Audio through CAOHC. She can perform hair/saliva collection for drug/alcohol testing and Pulmonary Function Tests. She is also fluent in Spanish.

Chris Pina is a Clinical Medical Assistant and has been with Sharp HealthCare for almost 1 year. He has certifications in DOT Urine Collection, DOT Alcohol Collection, CPR, and Audio through CAOHC. He can perform hair/saliva collection for drug/alcohol testing, and Pulmonary Function Tests. He is also fluent in Spanish.

Erika Murillo is a Clinical Medical Assistant and has 14 years' experience in healthcare, 12 of those years in Occupational Medicine. She holds certification in CAOHC, PFT, BAT, eScreen/UDS, and CAOHC. She progressed into the role of Clinical Staff Coordinator at the La Mesa site and handles clinical issues in the absence of the supervisor.

Lynette Tofili, LVN has 23 years' experience in healthcare, 17 of which are with Sharp Rees-Stealy, 15 years in Occupational Medicine, and holds certifications in PFT, BAT, BLS, eScreen/UDS, Hair Collection, and CAOHC.

Yessell Ruiz is a Clinical Medical Assistant and Clinical Staff Coordinator at the La Mesa site. She handles clinical issues, and staff concerns in the absence of the supervisor, and holds certification in CAOHC, PFT, BAT, BLS, and e-SCREEN/UDS.

Yaritza Perez is a Clinical Medical Assistant and Clinical Staff Coordinator at the Genesee site and has been with Sharp HealthCare for over 3 years. She has certifications in DOT Urine Collection, DOT Alcohol Collection, CPR, and Audio through CAOHC. Yaritza can perform hair/saliva collection for drug/alcohol testing, Pulmonary Function Tests, and is a trainer for DOT Urine Drug and Saliva collections. She is also fluent in Spanish.

Nohely Sandoval is a Clinical Medical Assistant and has been with Sharp HealthCare for almost 2 years. She has certifications in DOT Urine Collection, DOT Alcohol Collection, CPR, and Audio through CAOHC. She can perform hair/saliva collection for drug/alcohol testing and Pulmonary Function tests. She is also fluent in Spanish.

Jessica Valencia is a Clinical Medical Assistant and Clinical Staff Coordinator at the Sorrento Mesa site and has been with Sharp HealthCare for over 2.5 years. She has certifications in DOT Urine Collection, DOT Alcohol Collection, CPR, and Audio through CAOHC. She can perform hair/saliva collection for drug/alcohol testing, Pulmonary Function tests, and is a trainer for DOT Urine Drug and Breath Alcohol collections. She is also fluent in Spanish.

Angelina Vera is a Clinical Medical Assistant and has been with Sharp HealthCare for over 1 year. She has certifications in DOT Urine Collection, DOT Alcohol Collection, CPR, and Audio through CAOHC. Angelina can perform hair/saliva collection for drug/alcohol testing and Pulmonary Function tests. She is also fluent in Spanish.

Susan Manabat is a Clinical Medical Assistant and has 29 years of experience in Healthcare, with a background in Family Medicine. She joined Occupational Medicine in 2014 and served as an interim Clinical Staff Coordinator for a total of 3 years. Susan holds certifications in PFT, Urine Drug Screening, Breath Alcohol Testing, CAOHC, and CPR. She is also fluent in Tagalog.

Patricia Bravo is a Clinical Medical Assistant and has been a medical assistant for 32 years with a background in Urgent Care, Pediatrics, Dermatology, Internal Medicine, and Family Practice. She spent the last 6 years in Occupational Medicine and is certified in CAOHC, PFT, UDS, BAT, and CPR. She is also fluent in Spanish.

Angelique Quiros is a Clinical Medical Assistant who floats to various sites and has been with Sharp HealthCare for 19 years. She has certifications in CAOHC, PFT, UDS, BAT, and CPR.

Mirna Cortez is a Clinical Medical Assistant and has been with Sharp HealthCare for 9 years. She is certified in PFT, DOT Urine Drug Screening/Breath Alcohol Testing, Hair Collection, CPR, and is an Occupational Hearing Conservationist through CAOHC. She progressed into the role of Clinical Staff Coordinator at the Rancho Bernardo site in 2018 and handles clinical issues in the absence of the supervisor.

Jamie Fadare is a Clinical Medical Assistant and has been with Sharp HealthCare for 6 years. Prior, he was active duty with the US Navy as a Corpsman, then transferred to Active Reserve. He is certified in CPR, Spirometry, CAOHC, and Drug Screening.

Nila Desphy is a Clinical Medical Assistant and has been with Sharp HealthCare for 13 years. She has certifications in CAOHC, PFT, UDS, BAT, and CPR.

Josie Pedersen is a Clinical Medical Assistant and has worked at Sharp HealthCare since 1990, then joined Occupational Medicine in 1992. She is certified in PFT, BAT, BLS, CAOHC, eScreen/UDS, Hair Collection, Phlebotomy and in Travel Medicine. Josie splits her time between assisting in the Services-On-Site program and providing coverage on site.

Victor Sanchez is a Clinical Medical Assistant, has 2 years' experience in healthcare, and 1 year in Occupational Medicine. Victor is certified in BLS, PFT, BAT, e-SCREEN/UDS, Hair Collection, and CAOHC.

2.9 “Reserved” as stated in the City of San Diego RFP

TAB B

EXECUTIVE SUMMARY AND RESPONSES TO SPECIFICATIONS

2.10 Title page



**A PROPOSAL FOR
THE CITY OF SAN DIEGO
FOR
INDUSTRIAL MEDICAL SERVICES**

BY:

SHARP REES-STEALY MEDICAL GROUP

OCTOBER 6, 2025

City Contact: Lisa Hoffman, Senior Procurement Contracting Officer

Lhoffman@sandiego.gov

(619) 236-6096

Solicitation Number: 10090302-26-L

Due Date: October 9, 2025 @ 2:00pm

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2.12 Executive Summary

Proposal for Industrial Medical Services

Solicitation #: 10090302-26-L

Submitted by: Sharp Rees-Stealy

Proposal Due Date: October 9, 2025 @ 2:00 p.m.

Sharp Rees-Stealy Medical Group and Medical Centers (SRS) is pleased to submit this proposal in response to the City of San Diego's Request for Proposal for Industrial Medical Services. With a long-standing partnership and proven track record of delivering coordinated, evidence-based care to City employees, SRSMG is uniquely positioned to continue supporting the City's workforce health and safety goals.

SRS offers a robust suite of Industrial Medical Services delivered exclusively through our network of 19 clinics across San Diego County. Our integrated care model ensures seamless coordination across specialties including Rehabilitation, Laboratory, and Radiology services. City employees benefit from convenient access to care, personalized health information via the Sharp App, and timely reporting of Workers' Compensation documentation and clearance forms.

Our Occupational Medicine Program is built on a collaborative philosophy that brings together the employer, risk manager, and clinical team to support the injured worker. This triad approach ensures that care is not only clinically sound but also aligned with the City's operational and compliance objectives. SRS's conservative, evidence-based treatment protocols promote optimal outcomes while managing costs effectively.

SRS's proposal aligns with the City's goal of securing high-quality care at the best overall market value. We understand that value is defined not only by cost but by clinical outcomes, service excellence, and operational efficiency. Our services are compliant with California Medical Provider Network (MPN) regulations, and we currently manage the City's MPN in accordance with Title 8, Sections 9767.1–9767.19 of the California Code of Regulations.

SRS clinics are accredited every three years by the Accreditation Association for Ambulatory Health Care (AAAHC), reflecting our commitment to delivering care that meets the highest standards of quality, safety, and efficiency. We also adhere to all applicable federal, state, and local regulatory guidelines.

Our pricing structure follows the Official Medical Fee Schedule as outlined by the Centers for Medicare & Medicaid Services and the State of California. SRS is committed to transparency, cost containment, and delivering measurable results that reflect our dedication to both quality and fiscal responsibility.

At the heart of our organization is The Sharp Experience—a culture of excellence that guides our physicians, staff, and volunteers in making health care better for our patients, their families, and our community. This philosophy drives every aspect of our service delivery and ensures that City employees receive compassionate, high-quality care.

2.13 Proposer's Response to the RFP

A. BACKGROUND

The City of San Diego (City) self-insures and self-administers its Workers' Compensation (WC) liability. The City, through its Risk Management Department, employs thirty-three (33) claims professionals, as well as support staff, in its administration of approximately 5,100 open WC files. The City is dedicated to providing superior customer service, the best medical care, and all appropriate indemnity benefits to its injured employees. In support of this goal, the City has formed a Medical Provider Network (MPN) and works closely with its current Industrial Medical Service providers to ensure outstanding medical services to the City's injured workforce.

This Request for Proposal (RFP) is being issued to solicit proposals from qualified providers for Industrial Medical Services for the City's self-insured and self-administered Workers' Compensation Program. The City's two (2) current contracts for Industrial Medical Services are scheduled to expire May 17, 2026, and September 12, 2026.

Sharp Rees-Stealy Medical Group and Medical Centers (SRS) appreciates the opportunity to respond to the City of San Diego's Request for Proposal for Industrial Medical Services. We commend the City's dedication to delivering superior customer service, high-quality medical care, and appropriate indemnity benefits to its injured employees through its self-insured and self-administered Workers' Compensation Program. SRS is equally committed to supporting this mission by providing a safe, accessible, and professional clinical environment for industrially injured City employees. Our facilities undergo regular inspections and updates to ensure compliance and uphold the highest standards of patient care. We continue to invest in new buildings and state-of-the-art equipment to enhance our services and deliver optimal outcomes for our patients.

SRS is well-positioned to support the City's goals through our comprehensive, patient-centered approach to occupational health. As a trusted provider in the region, we offer:

- **Experienced Clinical Team:** Our board-certified Occupational Medicine physicians, our advanced practice practitioners, and support staff are highly experienced in managing work-related injuries and collaborating with employers and claims professionals. SRS has expanded and grown to meet the needs of those we serve. Today SRS operates at 20 medical center locations. There are six locations with Occupational Medicine departments, six Urgent Care locations, eight

rehabilitative service locations, and four hospital locations. We staff 649 physicians and 140 advanced practice practitioners who are licensed to practice in the State of California. Every location is staffed with physicians and advanced practice practitioners. SRS's credentialing process meets the requirements of multiple accrediting agencies including NCQA and Accreditation Association for Ambulatory Health Care (AAAHC). A copy of this credentialing process is available upon request. SRS's physicians represent multiple medical specialties. The Occupational Medicine and Urgent Care clinics are available on a walk-in basis, no appointment required. Occupational Medicine physicians and advanced practice practitioners also offer visits via Tele-Medicine.

SRS Occupational Medicine physicians and advanced practice practitioners provide care directly to patients seen in the Occupational Medicine department and coordinates specialty care and ancillary services within and outside of SRS physical locations for employees and employers of San Diego. This unique approach to Occupational Medicine improves access to both primary Occupational Medicine and specialty physicians while reinforcing the quality of medical services.

- Quality medical services are provided by physicians and advanced practice practitioners trained and experienced in Occupational Medicine patient care. All Occupational Medicine physicians and advanced practice practitioners are well trained and highly skilled at caring for patients with work-related conditions.
- SRS's Occupational Medicine department provides medical and disability case management. Our physicians along with their ancillary case coordinators accept the responsibility of coordinating the care required by their patients. This approach ensures the continuity of care, timely treatment, appropriate disability management and cost-effective resource use.
- Primary and specialty care of both routine and complex occupational injuries and illnesses.
- Occupation specific ancillary programs in Physical Therapy, Upper Extremity Rehabilitation and work reconditioning.

Integrated Care Model: We provide seamless coordination across specialties, including Physical Therapy, Radiology, and Case Management, ensuring timely and effective treatment plans. Utilizing the combined resources of SRS, Sharp HealthCare, Sharp Rees-Stealy Medical Centers, and the City of San Diego's MPN, we are currently providing Occupational Medicine services to more than 1,068 San Diego public and private employers and in 2024 have provided 91,531 patient visits. Of that number, 2,283 were video visits. Specific services are available, from prevention services to specialty and hospital care providing the latest in state-of-the-art treatments in all fields of medicine. SRS provides comprehensive Occupational Health and Rehabilitation Services, including:

- **Workplace Rehabilitation & Evaluation:** Work hardening, vocational and functional capacity evaluations, ADA accommodation consulting, and disability assessments (QME, AME, IME).

- **Preventive & Environmental Health Services:** Toxic exposure management, ergonomic assessments, CAL/OSHA compliance support, and worksite environmental consulting.
- **Medical Surveillance & Compliance Programs:** OSHA-mandated surveillance (e.g., respirator clearance, hearing conservation, hazardous materials), specialized medical programs for regulatory compliance, and drug testing (DOT and non-DOT).
- **Employee Health & Fitness Programs:** Pre-placement, periodic, and fitness-for-duty exams tailored to occupational roles, including public safety personnel.
- **Executive Health Services:** Comprehensive executive physicals.
- **MPN Collaboration:** SRS is committed to working closely with the City's Medical Provider Network (MPN) to ensure compliance, continuity of care, and optimal outcomes for injured employees.
- **Customized Reporting and Communication:** We understand the importance of timely and accurate communication with the City's Risk Management Department and claims professionals. Our team is equipped to provide customized reporting and proactive case updates.
 - Occupational physicians and staff are committed to being personally available to their patients, employer representatives, and risk managers. This access both improves customer service and ensures the appropriate coordination of care and timely flow of information to all parties.
 - Sharp Link is SRS's Employer and Carrier Portal. The portal is a way to deliver better quality services, care, and outcomes. The Sharp Link portal is an effective web services network that connects each Occupational Health partners to documents in a secure e-community, enabling authorized individuals to obtain electronic copies of all necessary documents via a common easy-to-use viewing platform. In some cases, we were able to decrease expenses related to faxing and re-faxing of documents. We noted decrease in wait-times for chart notes, exam results, and retrieval of paper files to review notes. The Sharp Link portal was designed to offer secure, easy on demand access to all authorized users. Thereby, resolving the issue of paperwork delays, which allows results in employers receiving the information employers need to manage an employee case.
- **Convenient Access:** With multiple clinic locations across San Diego County, we offer convenient access for City employees, minimizing downtime and facilitating return-to-work strategies.

SRS offers a robust Occupational Medicine program designed to meet the needs of employers and their workforce around the clock. Care for injured employees is available 24 hours a day, 365 days a year through a coordinated system of dedicated services:

- **Occupational Medicine Clinics:** Staffed by experienced professionals, our six dedicated clinics operate Monday through Friday from 8:00 a.m. to 5:00 p.m. Staff are also available outside of standard hours and remain on-call 24/7 to support urgent employer needs.

- Urgent Care Centers: Open daily from 8:00 a.m. to 8:00 p.m., including weekends and holidays. All Urgent Care physicians receive specialized training in occupational and industrial injury care from the Occupational Medicine Program Chair.
- Emergency Department Integration: For injuries occurring outside of clinic and urgent care hours, SRS maintains seamless access to Occupational Medicine services through Sharp HealthCare's hospital Emergency departments.

This integrated system—linking Occupational Medicine clinics, Urgent Care centers, and Emergency Departments—forms the largest countywide, 24-hour Occupational Medicine network in Southern California, ensuring timely, expert care for injured workers whenever and wherever it is needed.

Sharp Rees-Stealy Locations

Site	Address
Carmel Valley	12710 Carmel Country Rd., San Diego, CA 92130
Chula Vista (moving to the new Chula Vista location)	525 Third Ave., Chula Vista, CA 91910
Chula Vista Rehabilitation & Physical Therapy (moving to the new Chula Vista location)	344 F St., STE 300 Chula Vista, CA 91910
The new Chula Vista location	480 H Street, Chula Vista, CA 91910
Del Mar	2600 Via De La Valle, STE 200 Del Mar, CA 92014
Downtown	300 Fir St., San Diego, CA 92101
Frost St North	8010 Frost St., San Diego, CA 92123
Frost Street	8008 Frost St., STE 106 San Diego, CA 92123
Genesee (Moving to the new Kearny Mesa location)	2020 Genesee Ave., San Diego, CA 92123
The new Kearny Mesa	8975 – 8985 Balboa Ave, San Diego, CA 92123
La Mesa	5525 Grossmont Center Dr., La Mesa, CA 91942
Mira Mesa (Moving to the new Kearny Mesa location)	8933 Activity Rd., San Diego, CA 92126
Murphy Canyon (Moving to the new Kearny Mesa location)	9610 Granite Ridge Dr., STE A San Diego, CA 92123
Otay Ranch	1400 E Palomar St., Chula Vista, CA 91913
Point Loma	3555 Kenyon St., STE 200-201 San Diego, CA 92110
Rancho Bernardo	16899 W Bernardo Dr., San Diego, CA 92127
San Diego Main	2929 Health Center Dr., San Diego, CA 92123
Santee	8701 Cuyamaca St., Santee, CA 92071
Scripps Ranch	10670 Wexford St., San Diego, CA 92131
Sorrento Mesa	10243 Genetic Center Dr., San Diego, CA 92121
Surgical Eye Consultants Ophthalmology	3075 Health Center Dr., Floor 4, San Diego, CA 92123

Sharp HealthCare Emergency Rooms

Site	Address
Sharp Memorial Hospital	7901 Frost Street, San Diego, CA 92123

Sharp Grossmont Hospital
Sharp Coronado Hospital
Sharp Chula Vista Medical Center

5555 Grossmont Center Drive, La Mesa, CA 91942
250 Prospect Pl., Coronado, CA 92118
7901 Frost St., San Diego, CA 92123

- **Consultant Services:** SRS physicians serve as consultants to employers providing input on screening programs and new mandated requirements in Occupational Medicine, identifying patterns of injury in the Workers Compensation arena, and providing preventative recommendations proactively to reduce injury rates.
- **Conservative/Evidence Based Cost Effective Medical Treatment:** Occupational Medicine physician and advanced practice practitioners render medical care with an understanding of the principles of utilization management and maintaining an awareness of the cost of care and optimal outcomes.
 - Our Occupational Medicine physicians and staff have extensive experience collaborating with self-insured employers, workers' compensation insurance carriers, and third-party administrators. We routinely work with organizations such as State Compensation Insurance Fund, The Zenith, ESIS, Liberty Mutual, AIG, Travelers, and many others, ensuring seamless coordination and compliance with regulatory and administrative requirements.

The over-arching philosophy of the Occupational Medicine Program is to work in collaboration with the Risk Manager and Employer to care for the injured worker.



SRS believes that the best and most comprehensive Occupational Medicine program is a team that consists of the employer, the risk manager, and the physicians and advanced practice practitioners all caring for the employee. Collaboration is the key to our program's success. We collaborate with employers and risk managers, providing the information they need to support their employees, which leads to better overall outcomes. To support this partnership model, we have designed our program to allow direct communication with the Occupational Medicine leadership team including Dr. Munday, Department Chair, and Dr.

Kathy Head, Associate Department Chair in addition to the Occupational Medicine leadership email group, and dedicated phone line.

B. OBJECTIVE. The City wishes to achieve best market value while securing the best medical care for City employees injured on the job. The City is requesting proposals from firms qualified to deliver Industrial Medical Services as specified herein. The objective of this RFP is to make an award to a qualified provider(s) which represents the best overall value to the City while at the same time meeting the specifications and requirements of this RFP and California Medical Provider Regulations.

SRS fully supports the City's objective to secure the best medical care for industrially injured employees while achieving the best market value. SRS is committed to delivering high-quality, cost-effective, and compliant care that meets all specifications outlined in this RFP and adheres to California Medical Provider Network (MPN) regulations.

Commitment to Value and Quality

SRS has a long-standing partnership with the City of San Diego and a proven history of delivering coordinated, evidence-based care. We understand that value is not solely defined by cost, but by the combination of clinical outcomes, service excellence, and operational efficiency. Our approach includes:

- Experienced, Board-Certified Occupational Medicine and Medical Toxicology providers
- State-of-the-art facilities and equipment
 - New Otay Ranch building - adding urgent care, advanced radiology services, and rehabilitation services
 - New Chula Vista building - adding advanced imaging, additional primary care providers, and rehabilitation services
 - New Kearny Mesa building - expansion of advanced imaging services, co-locating and expanding services from our Murphy Canyon, Mira Mesa, and Genesee locations
 - Addition of new advanced imaging equipment
 - Replacement of Electrocardiogram equipment at all SRS locations.
- Integrated services including Physical Therapy, Radiology, Laboratory, and Case Management
- Sharp App is a secure, two-way communication portal, which allows the patient to connect with the care team.
- The recently released Sharp Link portal is provided to employers, risk managers, and insurance carriers for access to Workers' Compensation reports and clearance documents, reducing or eliminating the need to call in for this documentation. Sharp Link continues to improve with future updates to allow direct messaging with Sharp Occupational Health staff, as well as proactive notifications of new document availability.

Regulatory Compliance and MPN Standards

SRS complies fully with California Code of Regulations Title 8, Sections 9767.1–9767.19, governing Medical Provider Networks. Our services meet or exceed all regulatory requirements, including:

- **Timely access to care:** Initial evaluations within 24–48 hours and Urgent Care availability across multiple locations in San Diego County.
- **Continuity of care:** Seamless transitions between providers and specialties within our network.
- **Second and third opinion processes:** Facilitated in accordance with MPN guidelines.
 - The Occupational Medicine physician or advanced practice practitioner will follow the RFA workflow and note in the chart that the patient is requesting a second or third opinion.
 - The Occupational Medicine authorization team obtains the authorization and an appointment is scheduled.
 - The Occupational Medicine physician and advanced practice practitioner manage the case.
- **Utilization review and evidence-based treatment protocols:** SRS affirms that all medical treatment provided through out proposed MPN will comply with the California Division of Workers' Compensation's Medical Treatment Utilization Schedule (MTUS), as required under Title 8, California Code of Regulations, Sections 9767.1–9767.19.
- **Data transparency and quarterly reporting:** As requested will be tailored to the City's needs.

Proven Outcomes and Cost Management

SRS is proud to deliver measurable results that reflect our commitment to both quality and cost containment:

- **Average medical cost per claim** for City of San Diego cases treated exclusively at SRS is **\$684.00**.
- **The average duration of temporary total disability is 43 days.**
- **Quarterly performance data** is available upon request and includes key metrics such as claim duration, cost per claim, and patient satisfaction.

The data presented is available on a quarterly basis to the City of San Diego.

Service Excellence and Responsiveness

SRS is known for delivering **The Sharp Experience**—clinical and service excellence with an emphasis on kindness and compassion. The City's employees will receive this level of care at every touchpoint. We are committed to:

- **Timely communication** with City Risk Management and claims professionals

- **Rapid response** to unexpected needs or urgent requests
- **Ongoing collaboration** to support injury prevention and wellness initiatives

SRS is accredited every three years by the Accreditation Association for Ambulatory Health Care (AAAHC). The AAAHC is a leading accrediting body for outpatient health care organizations, recognized for prompting continuous quality improvement. AAAHC is especially important for SRS, offering specialized standards that validate our commitment to patient-centered care, including strong patient-provider relationships, comprehensive, and coordinated services and accessibility. Accreditation under AAAHC’s Medical Home standards not only ensures compliance with general safety and governance requirements, but also publicly affirms SRS excellence in delivering accessible, empowering, and continuous care.

SRS is transforming the health care experience and striving to be: The best place to work, practice medicine, and best place to receive care. Our organization is filled with passionate and incredibly caring personnel. From our clinicians, front desk staff to our housekeepers, we have dedicated personnel to create an elevated and personal experience for our patients and visitors with the utmost care, compassion, and respect creating what we call “The Sharp Experience.”

To support the success of Sharp’s transformation, we track the following Key Performance Indicators (KPI’s):

Overall Patient Satisfaction

- Sharp Rees-Stealy Occupational Medicine measures the overall satisfaction which is an indicator of how well a patient is being treated and how satisfied they are with the treatment received. We utilize Press Ganey survey data. Understanding patient experiences helps our department identify areas for improvement, leading to better outcomes for our patients.

Ability to Get Desired Appointment

- Sharp Rees-Stealy Occupational Medicine measures satisfaction level with the patient’s ability to get their desired appointment. Occupational Medicine provides high quality, convenient options for patients who walk in or call to schedule an appointment. Our access to care standards ensures that our department has a well-executed plan for access, securing timely access to care for our patients.

Telemedicine

- Sharp Rees-Stealy Occupational Medicine understands the importance of offering Telemedicine. Telemedicine allows patients to connect with Occupational Medicine providers via mobile phones and computers, minimizing lost duty time, offering convenience, continuity of care and accessibility. Our department measures appointment volumes through telemedicine to have full transparency to data and make our telemedicine program more effective.

SRS offers the City of San Diego a comprehensive, medically compliant, and value-driven solution for Industrial Medical Services. We are confident that our experience, healthcare outcomes, and commitment to service excellence make us the best overall value for the City's Workers' Compensation Program.

C. REQUIREMENTS OVERVIEW.

SRS acknowledges and accepts all requirements outlined in Section C of the City of San Diego's Request for Proposal for Industrial Medical Services. We are committed to full compliance with all applicable laws, regulations, and contractual obligations, and we affirm the following:

1. Proposer is responsible for understanding and complying with all requirements of the RFP. Proposer shall ensure all subcontractors understand and comply with all requirements of the RFP.

Sharp Rees-Stealy Medical Group confirms that we have thoroughly reviewed the RFP and we understand all requirements. We ensure that any subcontractors engaged in the delivery of services will also be fully informed and compliant with all RFP specifications and applicable regulations.

2. Proposer and all subcontractors shall agree to abide by the medical treatment pricing guidelines in the California Labor section 5307.1 and in Title 8, California Code of Regulations, Article 5.3, Official Medical Fee Schedule (OFMS), and Article 5.5, Application of the Official Medical Fee Schedule (Treatment). Increases or decreases to fees covered by the above statutes shall occur during the contract period only when the State provides an increase or decrease in fee(s) or when non-fee scheduled services are pre-negotiated and approved by the City.

SRS and all subcontractors agree to abide by the medical treatment pricing guidelines as defined in:

- **California Labor Code Section 5307.1**
- **Title 8, California Code of Regulations, Article 5.3 and Article 5.5 – Official Medical Fee Schedule (OMFS) and its application**

We understand that fee adjustments will only occur in accordance with State-issued updates or through pre-negotiated agreements with the City for non-fee scheduled services.

3. All Proposer services shall, at a minimum, meet the requirements of the Code of Federal Regulations, Cal/OSHA, and National Institute for Occupational Safety and Health.

All services provided by SRS will meet or exceed the standards set forth by:

- **Code of Federal Regulations**
- **Cal/OSHA** – including Title 8, Section 3400, which mandates readiness of medical personnel, first aid availability, and emergency response systems.
- **National Institute for Occupational Safety and Health (NIOSH)** – including applicable screening, surveillance, and safety protocols.

4. Proposer shall submit their medical records retention and confidentiality

policies and procedures with proposal. All policies and procedures must conform to all applicable laws, rules, and regulations.

Sharp Rees-Stealy Medical Group through the partnership with Sharp Rees-Stealy Medical Centers maintains robust policies and procedures for medical records retention and confidentiality. These policies conform to:

- HIPAA
- California Confidentiality of Medical Information Act
- Applicable federal and state laws

Our proposal includes documentation of these policies and procedures: reference section 2.8, C.4; page 33

5. Proposer shall arrange to provide the following for industrially injured City employees. Please note: The City wishes to achieve best market value. Proposer shall provide their best pricing offer for each of the listed services, on Exhibit B, Section J, Pricing Proposal pages using the fees outlined in the State of California's OFMS as a guideline:

Sharp Rees-Stealy Medical Group will provide best-value pricing for all services listed in Exhibit B, Section J, using the State of California's OMFS as a guideline. Our proposal includes detailed pricing and service descriptions.

5.1 Outpatient Surgical Services.

Sharp Rees-Stealy Medical Group proposes the use of outpatient surgical services located at:

- Mission Valley Heights Surgical Center
- Poway Surgical Center
- Sharp Outpatient Pavilion
- San Diego Surgery Center
- Rady Children's Hospital

- Grossmont Medical Plaza Outpatient Surgery Center
- Otay Lakes Surgery Center
- Carlsbad Surgery Center

5.2 Inpatient/Outpatient Hospital Services (other than out-patient surgical) if such services are available for the Proposer to provide. The City wishes to achieve the best market value along with the best hospital care available in San Diego County.

Inpatient/Outpatient Hospital Services – Occupational Medicine physicians and advanced practice providers will leverage Sharp HealthCare’s hospital network for high-quality care. Sharp Rees-Stealy Medical Group proposes inpatient/outpatient hospital services for city employees be provided at Sharp Hospital facilities:

- Sharp Metropolitan Medical Campus
 - Sharp Memorial Hospital
 - Outpatient Pavilion
 - Sharp Mary Birch Hospital for Women
 - Sharp Mesa Vista Hospital
 - Sharp McDonald Center
- Sharp Grossmont Hospital
- Sharp Chula Vista Medical Center
- Sharp Coronado Hospital and Healthcare Center
- Sharp affiliated Skilled Nursing Facilities

5.3 Radiological Services that shall include magnetic resonance imaging

(MRI) scans, computerized axial tomography (CAT) scans, and all other scans used as a diagnostic service. Proposer shall provide a best pricing offer for the listed scans using the state’s OMFS as a guideline.

Radiological Services – including MRI, CT, and other diagnostic imaging. At SRS, we deliver comprehensive radiology services designed to accelerate diagnosis and optimize treatment for work-related injuries. Our imaging technology is state-of-the-art. By using cutting edge technology, we ensure exceptional image clarity while minimizing radiation exposure—protecting both the health and safety of your employees. SRS has made significant investments in upgrading medical equipment and expanding access to advanced imaging technologies across San Diego County.

All Radiologic Technologists are trained and credentialed as required by the State of California. The Radiologists are board-certified under the supervision of Curtis R. Duffield, MD Chair of the Radiology department. Dr. Duffield began his career with SRS on 9/1/2011 and was board certified in 2010.

For all Radiology imaging exams PET, CT, MRI, CT, Ultrasound, Mammography or X-ray, our radiology team works seamlessly with Occupational Medicine providers to deliver fast,

accurate results that support timely return-to-work decisions. With multiple imaging centers throughout San Diego County, we offer convenient access, rapid scheduling, and secure digital reporting to meet the City's operational needs.

SRS Radiology

Site	Address
Chula Vista	525 Third Ave., Chula Vista, CA 91910
Del Mar	2600 Via De La Valle, STE 200 Del Mar, CA 92014
Downtown	300 Fir St., San Diego, CA 92101
Frost Street	8008 Frost St., STE 106 San Diego, CA 92123
Genesee (Relocating Kearny Mesa)	2020 Genesee Ave., San Diego, CA 92123
New Kearny Mesa open FY 2026	8975 – 8985 Balboa Ave, San Diego, CA 92123
La Mesa	5525 Grossmont Center Dr., La Mesa, CA 91942
Mira Mesa (Relocating to Kearny Mesa)	8933 Activity Rd., San Diego, CA 92126
Otay Ranch	1400 E Palomar St., Chula Vista, CA 91913
Rancho Bernardo	16899 W Bernardo Dr., San Diego, CA 92127
San Diego Main	2929 Health Center Dr., San Diego, CA 92123
Santee	8701 Cuyamaca St., Santee, CA 92071
Scripps Ranch	10670 Wexford St., San Diego, CA 92131
Sorrento Mesa	10243 Genetic Center Dr., San Diego, CA 92121

Site Definitions

CV - Chula Vista	DM - Del Mar
DT - Downtown	
FS - Frost Street (Kearney Mesa)	GMP - Grossmont Medical Plaza (La Mesa)
GN - Genesee (Kearney Mesa)	MM - Mira Mesa
OR - Otay Ranch	RB - Rancho Bernardo
ST - Santee	SDM - Sharp Memorial Camus
SM - Sorrento Mesa	SR - Scripps Ranch

Radiological Services: 5.3

Site	MFG	Modality-Type	Equipment / Model Name & #	Manufacture Date
DT	GE	Bone Density DEXA	RNB0022LU125	Jan-14
DT	X-Cel	Foot Unit	302868	Mar-90
DT	Fuji	Foot Unit - DR Plate	96751013	7/1/2019
DT	Fuji	Fluoro - DR Plate	121151	n/a
DT	Shimadzu	Fluoro - Wall Bucky	41AF6C772008	2/10/2017
DT	Shimadzu	Fluoro - Table	41C351674011	4/5/2017
DT	Shimadzu	Fluoro - Tube	MP6419F71004	Jan-17
DT	Shimadzu	Fluoro - X-ray Tube	RM6D9E877002	7/18/2017
DT	Shimadzu	Fluoro - Collimator	MPC294D69008	9/14/2016
DT	Shimadzu	Fluoro	M1C3BA07A001	n/a
DT	Shimadzu	Fluoro	M1C37BE74001	n/a
DT	Fuji	General X-ray - DR Plate	76751577	7/1/2017
DT	Fuji	General X-ray - DR Plate	86751496	7/1/2018
DT	Shimadzu	General X-ray - Tube	RM6D8586B055	Nov-16
DT	Shimadzu	General X-ray - Collimator	MPC294D73014	3/14/2017
DT	Shimadzu	General X-ray - Table	402ABB874004	4/10/2017
DT	Shimadzu	General X-ray - Wall Bucky	41AF6C772003	2/3/2017
DT	Fuji	General X-ray - DR Plate	6396153	3/1/2020
DT	Fuji	General X-ray - DR Plate	77000882	10/1/2017
DT	Siemens	General X-ray - Tube	100926	Mar-23
DT	Siemens	General X-ray - Collimator	14794	Jun-19
DT	Siemens	General X-ray - Table	1047	2012
DT	Siemens	General X-ray - Wall Bucky	1123	2012
DT	Hologic	Mammography	SDM131901178	4/21/2020
DT	Hologic	Mammography	SDM131901179	4/21/2020

DT	GE	Ultrasound	LogiqE10 500446US8	Sep-20
DT	GE	Ultrasound	LogiqE10 500446US8	Sep-20
DT	GE	Ultrasound	LogiqE10 500446US8	Sep-20
DT	GE	Ultrasound	LogiqE10 500446US8	Sep-20
DT	Fuji	Workstation	2590309266	Sep-21
DT	Fuji	Workstation	2590102379	Oct-17
DT	Fuji	Workstation	2590095470	Aug-17
DT	Fuji	Workstation	2590303691	Aug-21
DT	Hologic	SV Workstation	9780320D0551	Dec-19
DT	Hologic	SV Workstation	9781022D1241	Oct-22
DT	Hologic	SV Workstation	9780820D0633	Feb-20
RB	Siemens	General Radiology	10606040	16-Jul
RB	Shimadzu	General X-Ray	RadSpeed UD 150B-40	13-Jul
RB	X-Cel	Foot Unit	X-Cel Podiatry	Nov-00
RB	GE	Mammography	Senographe Essential	2014
RB	GE	Mammography	Senographe Essential	2016
RB	Fuji	DR	DEVO 17"X17"	16-Feb
RB	Fuji	DR	DEVO II 14"X17"	16-Jul
RB	Fuji	DR	DEVO II 17"X17"	15-Feb
RB	Fuji	DR	DEVO II 14"X17"	26-Jan
RB	Fuji	DR	DEVO II 24cm X 30cm	16-Jun
RB	Fuji	Workstation	Diagnostic Workstation	N/A
DM	Fuji	DR	DEVO 14"X17"	13-Sep
SR	Siemens	General X-Ray	DR Velocity Upright	2007
SR	Siemens	General X-Ray	DR Velocity Table	2007
OR	Del Medical	Buckstand	VS300	Sep-20
OR	Siemens	D-Evo Suite FSX	04803263	Aug-20
OR	x-cell x-ray corp	x-cell x-ray foot	MB700NC	Jan-92
OR	GE	Ultrasound	LOGIQE10	1/13/2022
OR	Nano Sonics	Trophon	N-5000-1	3/1/2024
OR	GE	Ultrasound	LOGIQE10	3/6/2025
OR	Nano Sonics	Trophon	N-5000-1	3/4/2024
OR	Siemens	DFR Suite 11 D-Evo	04802349	Oct-23
OR	Siemens	Bucky Wall Stand	10681703	Jun-24
OR	Siemens	X-Ray Suite FSX D-Evo	04803263	Aug-20
OR	Del Medical	Bucky Stand	VS300	Sep-20
OR	Cannon	CT	Aquilion Prime SN	Sep-24
OR	GE	MRI	Voyager	2/20/2025
OR	Hologic	Selena Dimention System	SDA-SYS-3000-3D	1/10/2022
OR	Hologic	Selena Dimention System	SDA-SYS-3000-3D	12/9/2021
OR	GE	X-ray	Prodigy	Dec-24
CV	Siemens	X-ray	Polydoras 11	Jul-11
CV	Shimadzu	X-ray	Radspeed	Sep-15
CV	Shimadzu	X-ray Stand	Radspeed	Mar-11
CV	Shimadzu	X-ray Stand	Radspeed	Mar-10
CV	Shimadzu	X-Ray	Radspeed	8/7/2018
CV	x-cell x-ray corp	Foot X-ray	MB-700 A/C	Nov-14
GEN	Siemens	X-Ray	FDRD-Evo Suite 11	Nov-24
GEN	Siemens	Bucky Stand	2089	Jun-18
FS	Hologic	Flourosan	Insight FD	1/31/2022
FS	Siemens	Bucky Stand	05905018	Jan-06
FS	Siemens	X-Ray	4082349	Mar-07
FS	Siemens	Bucky Stand	05904805	May-11
FS	Siemens	X-Ray	4902349	Oct-23
SM	Shimadzu	General Xray	RadSpeed	3/1/2010
MM	X-Cel	Foot Unit	X-Cel R700 AC Podiatry	11/1996
SM	Shimadzu	Fluoroscopy	G4	6/11/2029
SM	Hologic	Mammography	Senographe Essential	4/27/2021
SM	Fuji (Affirm)	DR	Devo II 17" x 17"	03/15
SM	Fuji (Affirm)	DR	Devo II 14" x 17"	03/15
MM	Hologic	Mammography	3D	4/22/2020
MM	Hologic	Mammography	Essential	3/26/2020
MM	Shimadzu	Sonial Vision Safire II	N/A	7/2012
MM	Faxitron	Sterio/Mammo	Corevision	2015
MM	Medrad	Mammo-Injector	Medrad Stellant Dual	7/1/2014
MM	Toshiba	CT	Toshiba Aquilion Prime SP TSX-303B/10 160 Slice	08/2019
MM	Toshiba	CT	Toshiba Aquilion Prime SP TSX-303B/10 160 Slice	06/2019
MM	GE	Dexa	Lunar	01/2014
MM	GE	MR	GE 1.5T	2003
MM	GE	MR	GE 1.5T	2008
MM	Fuji	WorkStation	Diagnostic Station	9/7/2018
MM	Fuji	WorkStation	Diagnostic Station	7/5/2021

5.4 Audiometric Services. Proposer shall provide audiometric examinations

consisting of air conduction, pure tone testing at the following test frequencies for each ear individually: 500, 1,000, 2,000, 3,000, 4,000, 6,000 and 8,000 Hz. All test vehicles, vestibules, and equipment must meet OSHA and ANSI specifications for audiometric testing.

Proposer shall provide a cost per employee for each protocol. Proposer shall include description of services provided and equipment utilized with their proposal. To provide pricing for this service see Exhibit B, Section J, Pricing Proposal pages, Section 1.

Audiometric Services – are compliant with OSHA and ANSI standards.

Sharp Rees-Stealy Medical Group utilizes the following state-of-the-art audiometric devices to conduct audiometric examinations consisting of air conduction, pure tone testing at test frequencies 500, 1,000, 2,000, 3,000, 4,000, 6,000 and 8,000 Hz. Occupational Medicine clinics utilize a pure tone air conduction audiometer primarily designed to assess hearing threshold levels against standard reference thresholds. Clinical staff calibrate the audiometer daily before patient use, and certified technicians perform comprehensive annual calibrations. The device supports both automatic and manual testing modes.

Hearing tests are conducted at frequencies of 500, 1000, 2000, 3000, 4000, 6000, and 8000 Hz. A medical assistant certified by CAOHC administers the audiogram. The provider reviews the results to interpret hearing status categorized as normal, mild loss, moderate loss, severe loss, or profound loss. These results are then discussed with the patient.

Recommendations may include the use of hearing protection if exposed to noise levels above 85 dB, or referrals to medical, ENT, or audiology specialists as needed.

Site Definitions	
CV - Chula Vista	DM - Del Mar
DT - Downtown	
FS - Frost Street (Kearney Mesa)	GMP - Grossmont Medical Plaza (La Mesa)
GN - Genesee (Kearney Mesa)	MM - Mira Mesa
OR - Otay Ranch	RB - Rancho Bernardo
ST - Santee	SDM - Sharp Memorial Camus
SM - Sorrento Mesa	SR - Scripps Ranch

Audiometric Services: 5.4

Site	MFG	Modality-Type	Equipment / Model Name & #	Manufacture Date
SM	Grason-Stadler (GSI)	Audiometer	Audio Star Pro	2017
SM	Interoustics (E3 Diagnostics)	Middle Ear Analyzer	Titan / Audiology	2017
SM	Tremetrics (E3 Diagnostics)	Audiometer	RA 300	2014
DT	Temetrics (E3 Diagnostics)	Audiometer	RA 360	2/16/2024
RB	Tremetrics	Audiometer	RA 300 / OccMed	2016
SR	Grason-Stadler	Audiometer	AudioStar Pro / Audiology	2015
SR	Interacoustics	Middle Ear Analyzer	Titan / Audiology	2019
SR	Grason-Stadler	Audiometer	AudioStar Pro / Audiology	2014
SR	MAICO	Middle Ear Analyzer	MI-44 / Audiology	2015
CV	Tremetrics	Audiometer	RA 300 / # 4523	2014
GEN	Tremetrics	Audiometer	RA360	2/16/2024

SECTION 1: AUDIOMETRIC SERVICES (See Exhibit B, Section C (5.4).

Item No.	Estimated Annual Quantity	Description	Price Per Each	Extension (Estimated Annual Quantity x Price per Each)
1.	800	Audiometric Examination	\$69.00 /EA	\$55,200/YR

TOTAL SECTION 1: \$55,200/YR

5.5 Respiratory Medical Services. To be considered for the respiratory medical examination component, Proposer must provide all the medical examination protocols outlined in section G in this Scope of Work. Proposer shall describe the services that shall be provided, the equipment that shall be utilized, and the cost per employee for each protocol. The occupational history protocol shown on Section J, Pricing Proposal pages, shall be performed for each employee who is required to wear a respirator. A copy of Proposer's medical history questionnaire must be included with the proposal. The respiratory physical examination shall include an evaluation of all vital signs necessary to determine an employee's fitness for wearing a respirator, given the employee's specific work setting (e.g. pulse, blood pressure, rate of respiration, etc.) and a clinical examination of the chest, heart, and face (for adequacy of respirator fit). The proposal shall state which vital signs will be evaluated and why, and describe the clinical examination offered. Proposer shall describe all equipment used in the Pulmonary Function Test.

The protocols shown on Exhibit B, Section J, Pricing Proposal pages, Section 3 shall be performed only when the examining physician has justifiable concern regarding health risk due to the use of the respirator, given an employee's specific work setting and only when the City has given prior approval. If Proposer believes that the medical

assessment for all employees wearing a specific type of respirator (e.g., self-contained breathing apparatus) should include these protocols, then Proposer shall so indicate, with explanation, in their proposal.

Respiratory Medical Services – SRS understands that respirators are an effective method of protection against designated hazards when selected and worn. In accordance with Title 8, Section 5144 of the California Administrative Code, titled “Respiratory Protection” we provide support to ensure the City meets the outlined requirements for employers to establish and implement a written respiratory protection program.

We understand that medically screening employees before using a respirator is crucial as “using a respirator may place a physiological burden on employees that varies with the type of respiration worn, the job and workplace conditions in which the respirator is used and the medical status of the employee” as stated in the US Department of Labor Occupational Safety and Health Administration 1910.134- Respiratory protection.

A full exam would be required for anyone needing to use an SCBA; while not a regulatory requirement, this is the department standard because of the cardiopulmonary demands of the respirator, as well as adverse effects on hearing, vision, and communication. Diver exams are regulated by a specific state standard that would be followed for their evaluations. Respiratory medical clearance for filtering facepieces, i.e., N95 respirators, can usually be completed with just the required Cal/OSHA questionnaire, but we recommend a full exam for other types of respirators, including a spirometric pulmonary function test.

Divers have their own standards and therefore this does not pertain to them. Since the pandemic, we have signed off filtering facepieces, i.e., N95 respirators with just the questionnaire but have preferred to do a full exam with spirometer for other types of respirators. A pulmonary function test is conducted as part of the clearance exam, although it may be unnecessary for employees only requiring evaluation to wear an N95 respirator.

It is important to keep in mind that our respiratory medical services are not just about the respirator but also the work employees will do while wearing a respirator. Our physicians determine the ability of a specific person to wear a respirator by considering factors such as the health of the employees and the type of respirator to be worn and the work conditions to be experienced. It should be emphasized that the physician determines the medical fitness only in our institution and does not perform the actual fit testing of the equipment.

The medical history review covers conditions related to the lungs (pulmonary), heart (cardiovascular), and any medications affecting breathing, cardiac function, blood pressure, or seizures. It also includes evaluation of respiratory device usage, vision and hearing impairments, and musculoskeletal or back issues.

As part of the respirator clearance process, the medical exam form documents the following vital signs: temperature, blood pressure, pulse, height, weight, and vision (including distance, color, and peripheral vision). During the physical examination, the provider assesses the skin, eyes, ears, nose, mouth, beard, neck, lungs, heart, abdomen, hernia, extremities, spine, and neurological function.

History is obtained using the mandated OSHA Respiratory Medical Evaluation Questionnaire. The Occupational Medicine physician will then amplify each question if checked yes by the patient. Some concerns include:

- **Lung Diseases:** such as asthma, emphysema, chronic obstructive pulmonary disease or pneumoconiosis or other chronic illnesses are often contraindications for wearing respirators. The rationale is that increased air resistance and dead space may cause excessive burden to the patient's cardiopulmonary system. Respiratory control disorders may also be a significant problem.
- **Allergies:** can be important if significant allergic rhinitis or constant rhinorrhea exists, increasing the level of discomfort and greater tendency to remove respirator masks.
- **Heart Disease:** A person with a history of angina pectoris, congestive heart failure, myocardial infarction, arrhythmia, other significant cardiac disease, progressive or severe hypertension or cerebral vascular accidents may be unable to safely wear respirators. This is because a respirator will increase cardiovascular load to the patient.
- **Fainting:** Fainting episodes or seizure disorders can present a significant problem in certain situations and would need careful evaluation of any safety risks to the employee or others before determining fitness to wear a respirator. It is also important to consider risks associated with entry into a confined space.
- **High Blood Pressure:** Persons with severe hypertension may not qualify to wear a respirator because of potential increase in cardiovascular load that could lead to health effects.
- **Diabetes:** A person with unstable diabetes is prone to syncope or temporary loss of consciousness. However, if diabetes is under good medical control, the person should not be disqualified for respirator wear, but depending on the medications used, certain limitations, such as confined space entry could be affected.
- **Emotional Illness:** A person with severe anxiety, neurosis or other psychiatric conditions may be unable to safely use a respirator.
- **Back or Joint Problems:** Since some self-contained breathing apparatus may weigh up to 25-30 pounds, severe spinal problems may prevent safe wear of

some types of respirators. Furthermore, these conditions may cause improper fitting of respirators.

- **Fear of Tight or Enclosed Spaces:** A person with claustrophobia may be unable to safely use a respirator for any significant period of time.
- **Trouble Breathing:** A person with overt cardiovascular pulmonary or hematologic diseases may have trouble breathing. These conditions may present only as a breathing difficulty to the patient and should be identified and stabilized before the patient is qualified to wear a respirator.
- **Heat Exhaustion:** A person with a history of significant heat exhaustion may not be qualified to wear a respirator. The rationale is that of increased perspiration caused by the use of various types of gear. Additionally, there is significant cardiovascular load.
- **Ruptured Eardrum:** Perforation of the eardrum is not a contraindication to respirator use. There is not respiratory airflow down the Eustachian tube so this does not represent an alternate route of inhalation.
- **Contacts and Glasses:** Use of contact lenses in all workplaces and all work types with all types of respirators is generally accepted by OSHA. The worker should be instructed on the importance of proper contact lens use, the symptoms associated with malfunction and the importance of seeking immediate help if a problem occurs (i.e. dislodging, etc.). Workers who need to wear eyeglasses under full face masks must have prescription glasses made which can be mounted inside the face piece since the temple bars will break with the face shield.
- **Hearing Loss:** Since communication is particularly important while wearing certain types of respirators such as self-contained breathing apparatus, adequate hearing is important to qualify the person to wear a respirator. This applies with or without hearing aids.
- **Dentures:** The integrity of the face seal may depend upon whether the dentures are worn on the job and how they affect the shape of the face. If the person who wears dentures has good facial seal, he should be qualified. This is an issue to the safety professional and not to the physician. However, the wearing of dentures should be documented in the record.
- **Skin Sensitivity:** If the person is sensitive to ingredients contained in the mask it may cause severe contact dermatitis, and the person may not be qualified to wear a certain type of respirator.
- **Current Medications:** There are a large number of medications which would indicate some of the concerns raised in the original list of questions and therefore be important to evaluate.
- **History of Respirator Wear:** Respirator wear in the past and known troubles wearing a respirator are important.

- **Abnormal X-rays:** Abnormal x-rays are important and might indicate need for further evaluation.
- **Occupational History:** It is important to discuss the type and weight of respirator to be worn and conditions under which the respirator will be used. This should include duration and frequency of respirator use, the expected physical work effort, additional protective clothing and equipment, temperature and humidity extremes and potential substances to which the worker could be exposed to. This information should be obtained as part of the information from the employer. However, it is important to discuss this with the patient.
- **Current Medications:** There are a large number of medications which would indicate some of the concerns raised in the original list of questions and therefore be important to evaluate.
- **History of Respirator Wear:** Respirator wear in the past and known troubles wearing a respirator are important.
- **Abnormal X-Rays:** Abnormal X-Rays are important and might indicate need for further evaluation.

Following the discussion of employees' history, a physical examination is completed as needed. Vital signs are obtained including blood pressure, pulse, respiration, temperature, height and weight. The blood pressure is monitored to confirm the employee does not have uncontrolled hypertension or other cardiovascular health risk, which could increase the workload on the cardiovascular system while the employee is wearing a respirator. The pulse is evaluated because it is a basic vital sign it aids in determining fitness for wearing a respirator. An abnormal pulse (e.g., tachycardia, bradycardia, hypertension, and any arrhythmia) could be exacerbated by respirator use. Respiration may indicate abnormal pulmonary or cardiac problems. Temperature may indicate the presence of acute infection or other abnormalities. Height and weight are important for performance of an adequate pulmonary function test. The general physical examination concentrates on the issues involved in the discussion of the employee's medical history. The physician will complete a general physical examination with concentration on abnormality he has elicited during the history taking portion of the examination.

Following history and physical a pulmonary function test will be performed as needed. It is our recommendation that if the history and physical give no indication of significant problems and the pulmonary function test is interpreted based on the employee's history and physical exam is abnormal:

- Assure that the pulmonary test was adequately administered, checking for operator errors and repeating the pulmonary function test assuring that the patient has refrained from cigarette smoking for several hours prior to the test and that the patient is free of upper respiratory illness for at least one week.

- If the spirometry is abnormal, further evaluation with lung volumes, and/or lung imaging, such as a CXR or CT scan may be needed if clinically indicated. Because spirometry is a screening examination, the patient should be referred to the Pulmonary Lab for comprehensive pulmonary function testing.

The final conclusion on medical fitness to wear a respirator will be an overall judgment based upon the multiple factors discussed. Most people who are reasonably fit should have no problem wearing a respirator. However, due to the extreme hazards faced by some respirator wearers (i.e., firefighters) this evaluation is extremely important to their safety and health.

These examinations are being done for the protection of the patient involved. If any patient disagrees with the findings of our department, one should ask for a review of that examination. We will discuss the issues with the patient involved in order to make the most appropriate medical judgment. Dr. Munday is available to assist with particularly complex questions.

To promote consistency in the provision of these examinations, the Occupational Medicine Department has continual training for its physicians on the performance of these examinations. Additionally, the quality assurance program reviews a certain percentage of examinations performed by the occupational physicians. The goal of this entire program is to consistently provide a quality respirator clearance examination program which protects the safety and health of the employees involved.

SRS utilizes the CPFS/D USB Spirometer by MGC Diagnostics to perform pulmonary function testing. This includes pre- and post-bronchodilator assessments of Forced Vital Capacity (FVC), Slow Vital Capacity (SVC), Maximum Voluntary Ventilation (MVV), and challenge testing. The system also supports optional bronchial provocation testing for more advanced diagnostic needs.

The spirometer incorporates a wide range of predictive formulas, including NHANES III and Global Lung Initiative (GLI 2012), ensuring accurate and standardized interpretation across diverse populations.

Supplies used with the spirometer include:

- preVent® Flow Sensor
- preVent® Filter Mouthpiece
- Nose Clips
- Daily Calibration Syringe

These components support consistent, high-quality testing and compliance with clinical standards.

SRS understands that we will perform OSHA Respirator Mandatory Medical Evaluation Questionnaire, Occupational History, Physical Exam and Pulmonary Function Test to clear anyone using any respirator more than a dust mask.

Site Definitions				
CV - Chula Vista		DM - Del Mar		
DT - Downtown				
FS - Frost Street (Kearney Mesa)		GMP - Grossmont Medical Plaza (La Mesa)		
GN - Genesee (Kearney Mesa)		MM - Mira Mesa		
OR - Otay Ranch		RB - Rancho Bernardo		
ST - Santee		SDM - Sharp Memorial Camus		
SM - Sorrento Mesa		SR - Scripps Ranch		
Respiratory Medical Services: 5.5				
Site	MFG	Modality-Type	Equipment / Model Name & #	Manufacture Date
SM	Medical Graphics Corporation	Spirometer	CPFS/D	7/13/2022
DT	Medical Graphics Corporation	Spirometer	CPFS/D	7/13/2022
RB	Medical Graphics Corporation	Spirometer	CPFS/D	7/13/2022
LM	Medical Graphics Corporation	Spirometer	CPFS/D	7/13/2022
CV	Medical Graphics Corporation	Spirometer	CPFS/D-USB	7/13/2022
GEN	Medical Graphics Corporation	Spirometer	CPFS/D-USB	7/13/2022
GEN	GE, SUNTECH	Treadmill, Monitor	GE CASE V6.73, 2/14/2022 Sun Tech Tango M2	3/26/2022

SECTION 3: RESPIRATORY MEDICAL SERVICES – Protocol – At Physician Discretion Only
(See Exhibit B, Section C (5.5)).

Item No.	Estimated Annual Quantity	Description	Price Per Each	Extension (Estimated Annual Quantity x Price per Each)
1.	150	Chest X-Ray	\$49.00 /EA	\$7,350/YR
2.	150	EKG	\$24.00 /EA	\$3,600/YR
3.	150	Stress Test	\$120.00 /EA	\$18,000 /YR

TOTAL SECTION 3: \$ 28,950/YR



Rees-Stealy
Medical Centers

☐ 300 Fir Street
San Diego, CA 92101
(619) 446-1524

☐ 10243 Genetic Center Dr
San Diego, CA 92121
(858) 526-8150

☐ 2020 Genesee Ave
San Diego, CA 92123
(858) 616-8400

☐ 525 Third Avenue
Chula Vista, CA 91910
(619) 585-4050

☐ 5525 Grossmont Ctr Dr
La Mesa, CA 91914
(619) 644-6600

☐ 16899 W Bernardo Dr
San Diego, CA 92127
(858) 521-2350

OSHA RESPIRATOR MANDATORY MEDICAL EVALUATION QUESTIONNAIRE

Section 1

The following is required mandatory information that must be provided by every employee who has been selected to use any type of respirator (every year)
PLEASE PRINT

Name: _____ Date: _____
Job Title: _____ Age (to the nearest year): _____
Sex (circle one) Male or Female Height _____ ft _____ in. Weight: _____ lbs
Daytime phone number (area code) _____ Best time to reach you at that number: _____

Check the type of respirator you will use (You can check more than one category)

- ☐ N, R, or P disposable respirator (filter-mask, non-cartridge type only)
☐ Other type (for example, half – or full-facepiece type, powered-air purifying, supplied-air)
☐ Self-contained breathing apparatus (SCBA)

Yes	No

Have you worn a respirator _____

If "yes", what type(s) _____

Section 2

Yes	No

1 Do you currently smoke tobacco, or have you smoked tobacco in the last month? _____

2 Have you ever had any of the following conditions?

	Yes	No		Yes	No
Seizures (fits)			Diabetes (sugar disease)		
Allergic reactions that interfere with your breathing			Claustrophobia (fear of closed-in places)		
Trouble smelling odors					

3 Have you ever had any of the following pulmonary or lung problems?

	Yes	No		Yes	No
Asbestosis			Chronic bronchitis		
Asthma			Emphysema		
Pneumonia			Tuberculosis		
Silicosis			Pneumothorax (collapsed lung)		
Lung Cancer			Broken ribs		
Any chest injuries or surgeries			Any other lung problem that you've been told about		

4 Do you currently have any of the following symptoms of pulmonary or lung illness?

	Yes	No		Yes	No
Shortness of breath			Chest pain when you breathe deeply		
Shortness of breath when walking with other people at an ordinary pace on level ground			Have to stop breath when walking at your own pace on level ground		
Shortness of breath when washing or dressing yourself			Shortness of breath that interferes with your job		
Coughing that produces phlegm (thick sputum)			Coughing that wakes you early in the morning		
Coughing that occurs mostly when you are lying down			Coughing up blood in the last month		
Wheezing			Wheezing that interferes with your job		
Shortness of breath when walking fast on level ground or walking up a slight hill or incline			Any other symptoms that you think may be related to lung problems		

5 Have you ever had any of the following cardiovascular or heart problems?

	Yes	No		Yes	No
Heart attack			Stroke		
Angina			Heart Failure		
Swelling in your legs or feet (not caused by walking)			Heart arrhythmia (heart beating irregularly)		
High blood pressure			Any other heart problem that you've been told about		

6 Have you ever had any of the following cardiovascular or heart symptoms?

	Yes	No		Yes	No
Frequent pain or tightness in your chest			Pain or tightness in your chest during physical activity		
Pain/tightness in your chest that interferes with your job			Heartburn or indigestion that is not related to eating		
In the past two years, have you noticed your heart skipping or missing a beat			Any other symptoms that you think may be related to heart or circulation problems		

7 Do you currently take medication for any of the following problems?

	Yes	No		Yes	No
Breathing or lung problems			Heart trouble		
Blood pressure			Seizures (fits)		

8 If you have used a respirator, have you ever had any of the following problems? (Check box if you have never used a respirator)

	Yes	No		Yes	No
Eye irritation			Skin allergies		
Anxiety			General weakness or fatigue		
Any other problem that interferes with your use of a respirator					

9 Would you like to talk to the health care professional who will review your answers to this questionnaire?

Yes	No

A. An employee (who has been selected) to use only a dust mask type of respirator, does not need to complete questions 10-15 below

B. Employees (who have been selected) to wear any other type of respirator, must complete questions 10-15 below

10 Have you ever lost vision in either eye (temporarily or permanently)?

Yes	No

11 Do you currently have any of the following vision problems?

	Yes	No		Yes	No
Wear contact lenses			Wear glasses		
Color blind			Any other eye or vision problems		

12 Have you ever had an injury to your ears, including a broken eardrum?

Yes	No

13. Do you currently have any of the following hearing problems?

	Yes	No		Yes	No
Difficulty hearing			Wear a hearing aid		
Any other hearing or ear problem					

14 Have you ever had a back injury?

Yes	No

15 Do you currently have any of the following musculoskeletal problems?

	Yes	No		Yes	No
Weakness in any of your arms, hands, legs or feet			Back pain		
Difficulty fully moving your arms or legs			Difficulty squatting to the ground		
Difficulty fully moving your head up or down			Difficulty fully moving your head side to side		
Difficulty bending at your knees			Pain/stiffness when you lean forward/backwards at the waist		
Climbing a flight of stairs or ladder carrying more than 25 lbs			Any other muscle or skeletal problem that interferes with using a respirator		

**OCCUPATIONAL HEALTH SERVICES
RESPIRATOR CLEARANCE EMPLOYER INFORMATION**

PATIENT NAME: _____

EMPLOYER NAME: _____

EMPLOYER CONTACT PERSON: _____

EMPLOYER PHONE NUMBER: _____

EMPLOYER FAX NUMBER: _____

TO EMPLOYER: Please provide answers to the following questions by having your employee bring this form with him at the time of the examination or fax this form to the appropriate clinic prior to appointment.

1. The type and weight of the respirator to be used by the employee.
2. The duration and frequency of respirator use (including use for rescue and escape).
3. The expected physical work effort.
4. Additional protective clothing and equipment to be worn.
5. Temperature and humidity extremes that may be encountered.

Fax Numbers:

Chula Vista (619) 585-4054
Downtown (619) 234-9160
Kearny Mesa (858) 616-8420

La Mesa (619) 644-6632
Sorrento Mesa (858) 526-6153
Rancho Bernardo (858) 521-2354

5.6 Health and Safety Training: Proposer shall agree to provide health and safety training to City personnel. Each successful Proposer shall agree to provide the first 25 hours of consulting/training in safety/prevention services during each contract year at no cost to the City. For services exceeding the 25-hour no cost to the City provision, Proposer shall provide an hourly fee for physician and non-physician involvement for consulting/training in safety/prevention services. To provide pricing for this service, see Section J, Pricing Proposal pages, Section 4.

Health and Safety Training – includes 25 hours of no-cost consulting/training annually, with hourly rates for additional services.

All protocols and pricing are included in the attached Exhibit B, Section J documentation.

SRS is fully prepared to meet the City of San Diego's requirements with integrity, compliance, and excellence. We look forward to continuing our partnership and delivering outstanding care and value to the City's workforce.

Refer to C 5. Requirements Overview - Price Proposal pages, page 58

D. CORE REQUIREMENTS.

1. Proposer shall act as part of the City's MPN and provide medical treatment to City employees who sustain work related injuries or illnesses, in compliance with California Labor Code, Title 8, California Code of Regulations, and all other applicable laws, rules, and regulations. Labor Code and Code of Regulations requirements include, but are not limited to, Regulation 9785 (reporting duties of the Primary Treating Physician), Labor Code Section 4610 and Article 5.5.1 of the Code of Regulations (Medical Treatment Utilization Review), Labor Code Section 5307.1 and Articles 5.3 and 5.5 (various fee schedules for payment of medical care), and Labor Code Sections 4616 through 4616.5 and Regulations 9767.1 through 9767.16 (Medical Provider Networks). Proposer shall agree to abide by all modifications that may occur to all applicable laws, rules, and regulations during the contract period.

SRS is fully prepared to meet the requirements outlined. SRS is fully compliant with California Labor Code, Title 8, California Code of Regulations, and all other applicable laws, rules, and regulations. Labor Code and Code of Regulations requirements include, but are not limited to, Regulation 9785 (reporting duties of the Primary Treating Physician), Labor Code Section 4610 and Article 5.5.1 of the Code of Regulations (Medical Treatment Utilization Review), Labor Code Section 5307.1 and Articles 5.3 and 5.5 (various fee

schedules for payment of medical care), and Labor Code Sections 4616 through 4616.5 and Regulations 9767.1 through 9767.16 (Medical Provider Networks). SRS will abide by all modifications that may occur to all applicable laws, rules, and regulations during the contract period.

2. The City reserves the right to award multiple contracts as best suits the needs of the City.

SRS understands that the City reserves the right to award multiple contracts that best suit the needs of the City.

3. Proposer, and all subcontractors, shall provide medical treatment during standard business days Monday through Friday, from 8am to 5pm. If medical treatment is needed after 5pm, on weekends, or on City observed holidays, Proposer shall make arrangements for the provision of medical treatment equal or superior to Proposer's. Proposer shall explain the methodology of providing the treatment in their proposal. Proposer shall provide City employees full service at Proposer's occupational medicine clinics on a walk-in, no appointment required basis. For previously scheduled appointments, in the case where a wait of 30 minutes or longer to see a physician for a medical appointment is anticipated, Proposer shall promptly offer City employees the opportunity to reschedule their appointment time. City observed holidays are: New Year's Day, Martin Luther King, Jr. Day, Presidents' Day, Cesar Chavez Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veterans' Day, Thanksgiving Day, and Christmas Day.

SRS and our subcontractor will provide medical treatment in the Occupational Medicine offices or the offices of our subcontractor - Monday through Friday, between the hours of 8:00 a.m. and 5:00 p.m. except holidays. The Occupational Medicine offices are located at:

SRS Occupational Medicine Clinics

Site	Address
Chula Vista (Relocating to new location)	525 Third Ave., Chula Vista, CA 91910
New Chula Vista location	480 H Street, Chula Vista, CA 91910
Downtown	300 Fir St., San Diego, CA 92101
Genesee (New Kearny Mesa)	2020 Genesee Ave., San Diego, CA 92123
La Mesa	5525 Grossmont Center Dr., La Mesa, CA 91942
Rancho Bernardo	16899 W Bernardo Dr., San Diego, CA 92127
Sorrento Mesa	10243 Genetic Center Dr., San Diego, CA 92121

On holidays and weekends injured employees may seek care in one or the six Urgent Care locations from 8:00 a.m. to 8:00 p.m.

SRS Urgent Care Centers

Site	Address
Chula Vista (Relocating to New Chula Vista location.	525 Third Ave., Chula Vista, CA 91910
New Chula Vista location	480 H Street, Chula Vista, CA 91910
Downtown	300 Fir St., San Diego, CA 92101
Otay Ranch	1400 E Palomar St., Chula Vista, CA 91913
Rancho Bernardo	16899 W Bernardo Dr., San Diego, CA 92127
Santee	8701 Cuyamaca St., Santee, CA 92071
Sorrento Mesa	10243 Genetic Center Dr., San Diego, CA 92121

After-hours Care is available at any Sharp Health Care Emergency Rooms throughout San Diego County 24-hours per day.

Sharp HealthCare Emergency Rooms

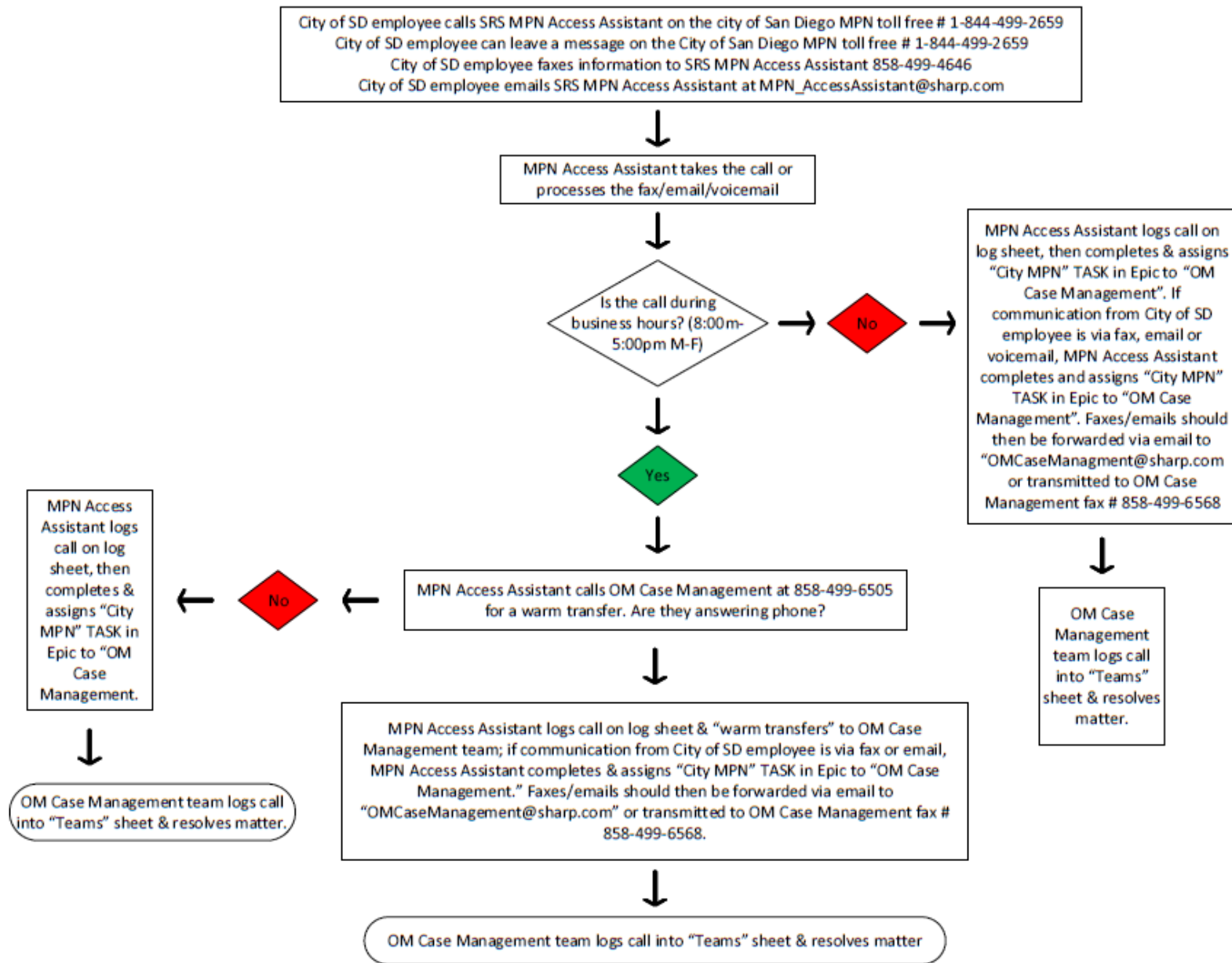
Site	Address
Sharp Memorial Hospital	7901 Frost Street, San Diego, CA 92123
Sharp Grossmont Hospital	5555 Grossmont Center Drive, La Mesa, CA 91942
Sharp Coronado Hospital	250 Prospect Pl., Coronado, CA 92118
Sharp Chula Vista Medical Center	7901 Frost St., San Diego, CA 92123

Occupational Medicine has a physician on call daily for 24 hours to answer questions.

4. Proposer shall provide a toll-free phone number and Medical Access Assistants for City employee use, as defined in California Regulation 9767.5 g, h (1) and (2). Medical Access Assistants shall be available to take calls Monday through Saturday from 7 am to 8 pm PT and shall assist injured workers with securing treatment needs. All calls will be logged with date, time, and subject. Proposer shall provide the log to the City upon request.

SRS City of San Diego MPN toll-free phone number is (844)499-2659 where Medical Access Assistants will assist City employees per California Regulation 9767.5 g, h (1) and (2) The toll-free number is available to take calls Monday through Saturday from 7 a.m. to 8 p.m. PT and shall assist injured workers with securing treatment needs. The fax number for the MPN Access Assistant is (858) 262-6780 and the email address is MPN_AccessAssistant@Sharp.com.

All calls from injured workers will be logged with date, time, and subject. We will maintain a log that is available to the City upon request.



SRS agrees to provide and adequately maintain medical facilities and equipment available to industrially injured City employees.

6.1 Exam rooms

SRS ensures that all exam rooms across our 19 facilities are standardized based on type of examination or procedure to be performed and maintained in full compliance with applicable regulations. Each exam room is designed and equipped in accordance with:

Americans with Disabilities Act (ADA) requirements to ensure accessibility for all patients;

Occupational Safety and Health Administration (OSHA) standards to promote safety and health in the workplace;

Federal healthcare regulations governing medical environments;

Local building codes at the time of construction to ensure structural integrity and operational safety.

SRS is committed to providing a safe, accessible, and professional clinical environment for industrially injured City employees. Our facilities undergo regular inspections and updates to maintain compliance and support high-quality patient care. We continue to invest in new buildings and state-of-the-art equipment to enhance our services and ensure the best possible outcomes for our patients.

- In late 2025, our dedicated Chula Vista staff and physicians will move into a brand-new, state-of-the-art Medical Office Building (MOB) at 480 H Street in Chula Vista. This marks a joyful milestone in our journey to better serve our community.
- Looking ahead to FY2026, our Genesee team will also embark on a hopeful new chapter as they relocate to our vibrant new location at 8975-8985 Balboa Avenue in San Diego. This modern MOB will expand our capabilities with advanced imaging and physical therapy services—bringing even more comprehensive care to our patients.

These moves reflect our deep commitment to innovation, growth, and the health of our communities.

6.2 Laboratory services

SRS operates laboratory services at 15 locations throughout San Diego County, each designed to meet the healthcare needs of City employees, including those with industrial injuries. SRS operates with full-service laboratories that support timely and accurate diagnostic testing. SRS laboratories utilize state-of-the-art equipment, which undergoes regularly scheduled preventative maintenance to ensure optimal performance and reliability.

Our laboratory teams consist of highly trained and experienced professionals who are committed to delivering exceptional service, maintaining exacting standards of quality, and ensuring regulatory compliance. Dr. Wahl and Dr. Bernaba lead our laboratory services team. Carter E. Wahl, MD is a pathologist at Sharp Rees Stealy Medical Centers in San Diego, California. He is triple boarded in clinical pathology, anatomic pathology and dermatopathology. He graduated from the Medical College of Wisconsin in 2002 and has over 23 years of experience in laboratory medicine and skin pathology. Dr. Bob N. Bernaba MD is a pathologist at Sharp Rees Stealy Medical Centers in San Diego, California. He is triple boarded in clinical pathology, anatomic pathology and dermatopathology. He graduated from the Saint Louis University School of Medicine in 2006 and completed his pathology training at UCLA. He has over 19 years of experience in laboratory medicine and skin pathology.

SRS is dedicated to continuous improvement and operational excellence. Our laboratory services are integrated into a cohesive system that prioritizes patient safety, efficiency, and satisfaction—ensuring consistent, high-quality care for City employees.

SRS Laboratory	
Site	Address
Carmel Valley	12710 Carmel Country Rd., San Diego, CA 92130
Chula Vista (Relocating to new Chula Vista)	525 Third Ave., Chula Vista, CA 91910
New Chula Vista location	480 H Street, Chula Vista, CA 91910
Del Mar	2600 Via De La Valle, STE 200 Del Mar, CA 92014
Downtown	300 Fir St., San Diego, CA 92101
Frost St North	8010 Frost St., San Diego, CA 92123
Genesee (Relocating to Kearny Mesa)	2020 Genesee Ave., San Diego, CA 92123
New Kearny Mesa opens FY 2026	8975 – 8985 Balboa Ave, San Diego, CA 92123
La Mesa	5525 Grossmont Center Dr., La Mesa, CA 91942
Mira Mesa	8933 Activity Rd., San Diego, CA 92126
Otay Ranch	1400 E Palomar St., Chula Vista, CA 91913
Point Loma	3555 Kenyon St., STE 200-201 San Diego, CA 92110
Rancho Bernardo	16899 W Bernardo Dr., San Diego, CA 92127
San Diego Main	2929 Health Center Dr., San Diego, CA 92123
Santee	8701 Cuyamaca St., Santee, CA 92071
Scripps Ranch	10670 Wexford St., San Diego, CA 92131
Sorrento Mesa	10243 Genetic Center Dr., San Diego, CA 92121

6.3 X-ray capabilities

SRS provides diagnostic imaging services at multiple locations, ensuring convenient access for industrially injured City employees. Each site is equipped with state-of-the-art

digital radiography systems that support high-resolution imaging and rapid turnaround times. Equipment is inspected routinely and certified by required governing bodies.

We offer various modalities, including, but not limited to X-Ray, DEXA (bone Density), Fluoroscopy, Mammography, CT, MRI, PET, CT, and Ultrasound.

Our radiology departments are staffed by certified radiologic technologists and supported by board-certified radiologists who ensure accurate interpretation and timely reporting. All equipment is maintained in accordance with manufacturer specifications and undergoes routine preventative maintenance to ensure safety, reliability, and compliance with:

California Department of Public Health – Radiologic Health Branch (CDPH-RHB) standards;

Occupational Safety and Health Administration (OSHA) requirements;

American College of Radiology (ACR) guidelines;

Local and federal regulatory standards for radiation safety and facility operations.

SRS is committed to delivering high-quality imaging services that support timely appointments, and efficient diagnosis and treatment for City employees. Our integrated electronic medical record system ensures secure and seamless access to imaging results for treating providers.

6.4 Pulmonary function equipment

SRS provides pulmonary function testing (PFT) services at our six Occupational Medicine locations to support the evaluation and treatment of City employees. Our facilities are equipped with advanced pulmonary function equipment that meets or exceeds current clinical and regulatory standards.

All equipment is:

Calibrated regularly to ensure accuracy and reliability.

Maintained through scheduled preventative maintenance in accordance with manufacturer guidelines.

Operated by trained personnel to ensure proper testing procedures and patient safety. Compliant with standards set by the American Thoracic Society (ATS), OSHA, National Institute for Occupational Safety and Health (NIOSH) and other applicable federal and state regulations.

SRS is committed to delivering high-quality respiratory diagnostic services that support timely clinical decision-making and effective care for City employees.

6.5 Electrocardiographic (EKG equipment)

SRS provides electrocardiographic (EKG) services at our six Occupational Medicine locations to support the evaluation and treatment of industrially injured City employees. Each facility is equipped with new modern, digital EKG machines purchased last year that meet current clinical and regulatory standards.

Our EKG equipment is:

Regularly calibrated and maintained in accordance with manufacturer specifications and preventative maintenance schedules.

Operated by trained clinical staff to ensure accurate testing and patient safety.

Integrated with our electronic medical record system, allowing for secure and efficient transmission of results to treating providers and to a Cardiologist.

Compliant with applicable standards from the American Heart Association (AHA), OSHA, and other federal and state regulatory bodies.

SRS is committed to providing timely, reliable cardiac diagnostic services that support high-quality care and clinical decision-making for City employees.

6.6 Diagnostic vision equipment

SRS provides diagnostic vision services at our six Occupational Medicine locations to support the evaluation and treatment of City employees. Our facilities are equipped with modern vision testing equipment designed to assess visual acuity, depth perception, color vision, and other key indicators of ocular health.

All diagnostic vision equipment is:

- **Maintained through scheduled preventative maintenance** to ensure accuracy and reliability;
- **Operated by trained clinical staff** in accordance with established protocols;
- **Compliant with applicable standards** from the Occupational Safety and Health Administration (OSHA), the American Optometric Association (AOA), and other relevant regulatory bodies;
- **Integrated into our clinical workflow** to support timely diagnosis and treatment planning.

SRS is committed to providing high-quality vision screening and diagnostic services that contribute to the comprehensive care of City employees recovering from work-related injuries.

6.7 Audiometric testing equipment

SRS provides audiometric testing services at our six Occupational Medicine locations to support the evaluation and treatment of City employees. Our facilities are equipped with calibrated audiometric testing equipment designed to assess hearing thresholds and detect occupational hearing loss.

All audiometric equipment is:

Maintained through scheduled preventative maintenance and calibrated in accordance with manufacturer specifications;

Operated by trained and CAOHC certified personnel following established clinical protocols;

Compliant with applicable standards from the Occupational Safety and Health Administration (OSHA), the American Speech-Language-Hearing Association (ASHA), and other relevant regulatory bodies;

Integrated into our clinical workflow to support timely diagnosis, documentation, and treatment planning.

SRS is committed to delivering accurate and reliable hearing assessments as part of our comprehensive occupational health services for City employees.

6.8 Physical Therapy facilities

SRS offers comprehensive Physical Therapy services across eight Rehabilitation Services locations, dedicated to supporting the recovery and functional restoration of industrially injured City employees. Our therapy departments are designed to provide a safe, effective, and patient-centered environment, with a strong emphasis on musculoskeletal rehabilitation and return-to-work readiness. Each facility is equipped with:

- State-of-the-art therapeutic equipment, including advanced treatment tables, resistance and cardio exercise machines, pain management modalities, and mobility aids tailored to individual needs;
- Private and semi-private treatment areas to ensure comfort confidentiality, and focused care;

- ADA-compliant layouts to ensure accessibility for patients with varying levels of mobility and functional ability;
- Rigorous preventative maintenance protocols to keep all equipment in peak condition and compliant with OSHA and other regulatory standards.

Our licensed therapists are highly trained in occupational injury rehabilitation and collaborate closely with referring providers to develop individualized treatment plans that address each patient's unique recovery goals. SRS is committed to delivering high-quality, evidence-based care that supports safe, timely, and sustainable return-to-work outcomes for City employees.

7. Proposer and all subcontractors shall complete the City's Industrial Disability Leave Slip (RM -1634/Medical Status Report- Attachment A) for each employee visit involving medical treatment or physical therapy. Completion of the RM-1634 form shall include timestamps of the City employee's arrival and departure time from the Proposer or subcontractor's facility. Proposer and all subcontractors shall agree to assist City's claims staff in returning employees to light duty, as appropriate. Proposer and all subcontractors shall provide City staff with written work restrictions, allowing city staff to select light duty positions, at the time of the injured worker's visit. The City will provide blank forms to designated contact of Proposer for distribution to their various clinics.

SRS fully understands and accepts the City of San Diego's requirement for completion of the RM-1634 Medical Status Report for each visit involving medical treatment or physical therapy for industrially injured City employees.

SRS and all affiliated subcontractors will:

Complete the RM-1634 form at each applicable visit, including accurate arrival and departure timestamps for the City employee;

Provide written work restrictions at the time of the visit to assist City staff in identifying appropriate light duty assignments;

Support the City's claims staff in facilitating return-to-work efforts, including light duty placement when medically appropriate;

Distribute blank RM-1634 forms to all relevant clinic locations upon receipt from the City's designated contact;

Ensure timely and accurate documentation to preserve benefits and support compliance with City policies and procedures.

SRS is committed to maintaining clear communication with City staff and ensuring that all documentation supports the safe and efficient recovery of injured employees.

8. Proposer shall provide, at no additional cost to the City, the ability for the City to electronically access the Contractor's portal/information, such as required workers' compensation reports and medical information concerning an employee's latest medical exam. To facilitate City's verbal requests for information, Proposer shall maintain physicians and administrative staff conversant with California Workers' Compensation laws and regulations who shall answer City staff questions at no additional cost to the City. Proposer shall provide same-day notifications whenever a City employee is taken off or returned to work. Proposer shall make available a principal physician or physicians to verbally respond to issues relating to workplace exposures and medical issues, as needed. This service shall include consultation with City claims/safety staff, City Supervisory/Management staff, and City Attorney staff. Proposer shall identify the available physician or physicians designated to provide this service in their proposal.

SRS is fully committed to supporting the City of San Diego's workers' compensation program through secure, timely, and collaborative communication. SRS will provide the following services at no additional cost to the City:

- **Electronic Portal Access:** The City will be granted secure access to SRS's Sharp Link, electronic portal, allowing designated staff to retrieve required workers' compensation reports and medical information, including documentation from the employee's latest medical exam.
- **Knowledgeable Staff Support:** SRS maintains a team of physicians and administrative professionals who are well-versed in **California Workers' Compensation laws and regulations**. These individuals are available to respond to verbal inquiries from City staff, ensuring accurate and timely information exchange.
- **Same-Day Notifications:** SRS will provide **same-day notification** to the City whenever an employee is taken off or returned to work. Notifications will include relevant medical documentation and work status updates.
- **Designated Physician Consultation:** SRS will make available **principal physicians** to verbally consult with City claims/safety staff, supervisory/management personnel, and City Attorney staff regarding workplace exposures and medical issues. These consultations will be provided as needed and without additional cost.
- **Designated Physicians for Consultation:** The following physicians are designated to provide verbal consultation services:
 - *Dr. Stephen Munday, MD – Occupational Medicine/Medical Toxicology*
 - *Dr. Kathy Head, MD – Occupational Medicine*

SRS is committed to maintaining transparency, responsiveness, and collaboration with City departments to ensure the effective management of industrial injuries and return-to-work efforts.

9. Proposer shall agree to utilize the pharmacy benefit network plan contracted with the City of San Diego to provide pharmacy benefits. The City's current pharmacy benefit network plan is Cadence RX.

SRS acknowledges and agrees to fully comply with the City of San Diego's requirement to utilize the designated pharmacy benefit network plan for all eligible industrially injured City employees. SRS Pharmacy is contracted with Cadence Rx.

SRS will:

- **Utilize the City's contracted pharmacy benefit network**, currently **Cadence RX**, for all applicable prescriptions and pharmacy services;
- **Coordinate with Cadence RX** to ensure timely and accurate processing of pharmacy benefits;
- **Educate prescribing providers and administrative staff** on the use of the designated network to ensure compliance and continuity of care;
- **Ensure no additional cost to the City** for the use of the pharmacy benefit network.

SRS is committed to supporting the City's workers' compensation program by ensuring seamless integration with its pharmacy benefit network and maintaining high standards of care and compliance.

10. Proposer shall agree to develop data reporting criteria, in coordination with the City, for information relating to industrial medical services provided by Proposer. The mutually developed reporting criteria shall be provided to the City on a quarterly basis. When requested, proposer agrees to meet quarterly with City management staff at no additional cost to the City whether the quarterly meeting be held virtually or in person at City offices.

SRS agrees to collaborate with the City of San Diego to develop mutually acceptable data reporting criteria related to industrial medical services provided to City employees. SRS will:

Coordinate with designated City staff to establish clear and relevant reporting metrics;
Provide quarterly reports summarizing medical services, treatment outcomes, and other agreed-upon data points;

Ensure reports are delivered in a timely, accurate, and secure manner, in formats compatible with City systems and workflows.

In addition, SRS agrees to:

Participate in quarterly meetings with City management staff at no additional cost to the City;

Attend meetings either virtually or in person at City offices, based on the City's preference;

Designate appropriate clinical and administrative representatives to ensure productive and informed discussions.

SRS is committed to transparency, collaboration, and continuous improvement in support of the City's workers' compensation and employee health programs.

11. Within thirty (30) days of Notice to Proceed, Proposer shall establish a mutually agreeable review process to identify, monitor, and resolve complaints made by City employees, in full compliance with all confidentiality requirements and legal constraints. Proposer shall disclose all such complaints to the City's Workers' Compensation Program Manager within five (5) business days of receipt. Proposer shall provide weekly status reports to the City's Workers' Compensation Program Manager on all open complaints. Proposer shall notify the City's Workers' Compensation Program Manager within five (5) business days of resolution of final disposition of complaint.

SRS agrees to establish a mutually acceptable complaint review process within thirty (30) days of receiving the City's Notice to Proceed. This process will be designed in collaboration with the City to ensure timely identification, monitoring, and resolution of complaints made by City employees, while maintaining full compliance with all applicable confidentiality requirements and legal constraints.

SRS will:

- **Disclose all complaints** to the City's Workers' Compensation Program Manager within **five (5) business days** of receipt;
- **Provide weekly status reports** on all open complaints to ensure transparency and facilitate resolution;
- **Notify the City's Workers' Compensation Program Manager** within **five (5) business days** of final disposition or resolution of each complaint;
- **Designate a dedicated administrative contact** to manage complaint tracking and communication with the City;

- **Ensure all staff involved in the complaint process are trained** in confidentiality protocols and workers' compensation procedures.

SRS is committed to maintaining a responsive and accountable complaint resolution process that supports the City's goals for employee care and program integrity.

12. Proper agrees to make its employees and its legal counsel available to the City by telephone and, when necessary, by personal appearance free of charge when cases are heard before the Workers' Compensation Appeals Board (WCAB). Proposer agrees to price all medical-legal testimony fees (depositions and WCAB testimony) in accordance with Title 8, California Code of Regulations, Section 9795.

SRS agrees to make its physicians, administrative staff, and legal counsel available to the City of San Diego, free of charge, for telephone consultations and, when necessary, in-person appearances related to cases heard before the Workers' Compensation Appeals Board (WCAB).

SRS further agrees to:

Price all medical-legal testimony fees, including depositions and WCAB testimony, in full compliance with Title 8, California Code of Regulations, Section 9795;

The employees and legal counsel are available to the City, including personal appearance, free of charge when cases are heard before the WCAB.

Coordinate with the City's legal and claims staff to ensure timely availability of designated personnel for WCAB-related matters;

Maintain accurate documentation of all testimony-related activities and billing in accordance with regulatory standards.

SRS is committed to supporting the City's workers' compensation program with responsive, compliant, and cost-effective medical-legal services.

13. Proposer and all subcontractors that provide outpatient or inpatient surgery shall agree that charges for surgical hardware or implants shall occur directly between the surgical facility and the hardware or implant manufacturer. The City will not accept bills directly from implant manufacturers or third-party billers. The hardware or implant manufacturer shall be the firm or company responsible for producing and/ or assembling the surgical hardware or implant. Proposer or subcontractor shall attach the manufacturer's invoice for the surgical hardware or implant to Proposer's or subcontractor's bill for services and forward the bill and invoice to the City.

SRS, Sharp HealthCare, Mission Valley Heights Surgical Center, Poway Surgical Center, Sharp Outpatient Pavilion, Carlsbad Surgery Center, Otay Lakes Surgery Center, and San Diego Surgery Center agree that charges for surgical hardware or implants shall occur directly between the surgical facility and the hardware or implants manufacturer. The hardware or implant manufacturer shall be the firm or company responsible for producing and/or assembling the surgical hardware or implant. SRS and/or subcontractors shall attach manufacturer's invoice for the surgical hardware or implants to the bill for services and forward the bill and invoice to the City.

14. Proposer shall not charge a “no show” fee for routine occupational medicine visits.

Specialty medical appointments are excluded from this requirement.

SRS will not charge a “no show” fee for routine Occupational Medicine visits but may charge a “no show” fee for specialty medical appointments.

E. MEDICAL PROVIDER NETWORK (MPN) REQUIREMENTS.

1. Proposer shall conform to all the Core Requirements above, as well as the following MPN Requirements.

SRS shall conform to all of the Core Requirements and the MPN requirements.

2. Proposer shall submit a list of physicians who will be providing Industrial Medical Services to the City. The following information shall be submitted electronically (i.e., as an Excel spreadsheet, not as a PDF) utilizing the template shown in Attachment B. Information includes: (1) Physician Name, (2) Specialty, (3) Physical Street Address, (4) City, (5) State, (6) Zip Code, (7) Any MPN Medical Group Affiliations, and (8) Assigned Provider Code. If a physician falls under more than one provider code, the physician shall be listed separately for each applicable provider code.

The following are the provider codes to be used: Primary Treating Physician (PTP), Orthopedic Medicine (ORTHO), Chiropractic (DC), Occupational medicine (OCCM), Acupuncture Medicine (LAC), Psychology (PSYCH), Pain Specialty Medicine (PM), Psychiatry,(PSY), Neurosurgery (NSG), Family Medicine (GP), Neurology (NEURO), Internal Medicine (IM), Physical Medicine and Rehabilitation (PMR), and Podiatry (DPM). If a provider's specialty does not fall under one of the above, then the specialty shall be designated as Miscellaneous, and the code used shall be (MISC). By submission of its provider listing, Proposer is affirming that all of the physicians listed have been informed that the Medical Treatment Utilization Schedule (“MTUS”) is presumptively correct on the issue of the extent and scope of medical treatment and

diagnostic services and have valid and current licenses to practice medicine and their identified specialties in the State of California.

SRS will submit a list of physicians who will be providing Industrial Medical Services to the City. SRS understands that the submission of the list affirms that all of the physicians listed have been informed that the Medical Treatment Utilization Schedule (“MTUS”) is presumptively correct on the issue of the extent and scope of medical treatment and diagnostic services and have valid and current licenses to practice medicine and their identified specialties in the State of California.

3. By submission of a response to this RFP, Proposer understands and agrees that the City retains the right of refusal or removal of any physician on the list at the City’s sole discretion.

SRS understands and agrees that the City maintains the right of refusal or removal of any physician on the list at its sole discretion.

4. Proposer must have primary treating physicians and a hospital for emergency health care services, or if separate from such hospital, a medical provider of all emergency health care services.

SRS agrees to have primary treating physicians and a hospital for emergency health care services. There are six Occupational Medicine locations each staffed with physicians who are primary treating physicians. There are four SHC hospitals in San Diego, each provides emergency health care services. The hospitals are Sharp Metropolitan Medical Campus, formerly referred to as Sharp Memorial Hospital, Sharp Chula Vista Medical Center, Sharp Coronado Hospital, and Sharp Grossmont Hospital.

5. Proposer shall submit ancillary service provider information in electronic (i.e., as an Excel spreadsheet, not as a PDF) format utilizing the template in Attachment C. Proposer shall complete the information in Attachment C in full including:

5.1 Ancillary Service Provider,

5.2 Specialty or Type of Service,

5.3 Physical Address,

5.4 City,

5.5 State,

5.6 Zip Code.

5.7 License number or certification to practice

5.8 Tax Identification Number (TIN)

By submission of this ancillary service information on Attachment C, Proposer is confirming that they are legally permitted to offer the required medical goods/services and that an existing contractual agreement exists between the Proposer and each listed ancillary service provider that will provide services for the City's MPN (Medical Provider Network).

SRS understands and agrees that by submission of the ancillary service information on Attachment C that we are confirming that the ancillary service providers are legally permitted to offer the required medical goods/services and that an existing contractual agreement exists between the SRS and each listed ancillary service provider that will provide services for the City's MPN (Medical Provide Network).

6. Proposer shall comply with California Code of Regulations 9767.5.1, which requires that Medical Groups have signed physician acknowledgements for all providers participating in the MPN. This requirement may be met for employees or partners of the medical group with one acknowledgement signed by an authorized agent. For physicians contracted outside of Proposers medical group, individual acknowledgements shall be maintained by Proposer and available for inspection upon City's request.

SRS affirms full compliance with **California Code of Regulations Title 8, Section 9767.5.1**, regarding physician acknowledgements for participation in the City of San Diego's Medical Provider Network (MPN).

SRS will:

- **Maintain signed physician acknowledgements** for all providers participating in the MPN, as required by regulation;
- For **employees, partners, or shareholders** of SRSMG, a single acknowledgment signed by an authorized agent of the medical group will be maintained;
- For **contracted physicians outside of SRSMG**, individual acknowledgements will be obtained and securely maintained;
- Ensure that all acknowledgements are **available for inspection** by the City upon request;
- Confirm that all listed physicians have been informed that the **Medical Treatment Utilization Schedule (MTUS)** is presumptively correct regarding the extent and scope of medical treatment and diagnostic services;
- Verify that all participating physicians hold **valid and current licenses** to practice medicine in their identified specialties within the State of California.

SRS is committed to maintaining regulatory compliance and transparency in support of the City's workers' compensation program.

7. Proposer understands and agrees that a City employee may select any physician within the MPN for treatment.

SRS understands and agrees that a City employee may select any physician within the MPN for treatment.

8. Proposer shall not discontinue treatment or refuse treatment (of an existing patient of providers) to a City employee unless first discussed with, and approved by, the Workers' Compensation Program Manager. Approval will be based on reasoning and reviewed on a case-by-case basis.

SRS will not discontinue treatment or refuse treatment (of an existing patient of provider) to a City employee unless it is first discussed with and approved by the Workers' Compensation Program Manager. SRS understands that approval will be based on reasoning and reviewed on a case-by-case basis.

9. It is a requirement that provider have telemedicine services and options for seeing patients remotely.

SRS understands and agrees that physicians and advanced practice practitioners are required to have telemedicine services and options for seeing patients remotely.

10. Proposer shall ensure that their physicians shall only treat or evaluate City employees at authorized MPN locations listed on the MPN website for all in person appointments.

SRS understands and agrees that we shall only treat or evaluate City employees at authorized MPN locations listed on the MPN website for all in person appointments.

11. Proposer shall refer City employees to physical therapists within the City's MPN, when possible. For first responders, Proposer shall agree to refer sworn police and fire patients to physical therapy facilities designated in first responder wellness contract in place with the City of San Diego Police Department and the City of San Diego Fire-Rescue Department.

Sharp Rees-Stealy Medical Group (SRS) acknowledges and agrees to comply with the City of San Diego's requirements regarding Physical Therapy referrals for industrially injured employees.

SRS will:

- **Refer City employees to physical therapists within the City’s designated Medical Provider Network (MPN)** whenever possible, ensuring continuity of care and compliance with the City’s workers’ compensation program;
- **Refer sworn police and fire personnel** to Physical Therapy facilities designated under the **First Responder Wellness Contracts** in place with the **San Diego Police Department** and **San Diego Fire-Rescue Department**.

SRS is committed to supporting the specialized needs of first responders and all City employees through compliant, responsive, and high-quality care coordination.

12. For non-emergency specialist services, Proposer shall ensure that an appointment is available with an appropriate specialist within twenty (20) business days from date of request by doctor, employee, and/or the City. If such an appointment is not available within 20 business days, Proposer agrees to refer injured worker to another appropriate specialist within the MPN who is available within that timeframe.

SRS agrees for non-emergency specialist services, SRS shall ensure that an appointment is available with an appropriate specialist within twenty (20) business days from the date of request by doctor, employee, and/or the City. If such an appointment is not available within 20 business days, SRS agrees to refer injured workers to another appropriate specialist within the MPN who is available within that timeframe.

13. Proposer and all subcontractors shall ensure all providers utilize the State mandated Request for Authorization (RFA) form for request of any treatment. RFA forms shall not be required for specialty referrals.

SRS will ensure all physicians and advanced practice practitioners will utilize the State mandated Request for Authorization (RFA) form for request of any treatment. SRS understands that the RFA form shall not be required for specialty referrals.

14. Proposer and all subcontractors must secure City’s authorization prior to any referral to a specialist. Whenever possible, specialty referrals shall be made within the MPN.

SRS and all subcontractors will secure City’s authorization prior to any referral to a specialist. Whenever possible, specialty referrals shall be made within the MPN.

15. Should the City contract with multiple Proposers for its MPN, Proposers shall agree to cooperate with one another and assist City employees with transitioning from one group to another when an employee elects to transfer care within the MPN.

SRS agrees to cooperate and assist other providers on the City’s MPN with transitioning from one group to another when an employee elects to transfer care within the MPN.

16. Should an injured City employee elect to pursue the Second and Third opinion process described in 8 Cal. Code Reg. 9767.7, Proposer shall ensure that a copy of the written report shall be served on the employee, the City's Claim Representative, and the treating physician within 20 days of the date of the appointment or receipt of the diagnostic tests, whichever is later.

SRS acknowledges and agrees to comply with **California Code of Regulations Title 8, Section 9767.7**, regarding the second and third opinion process for industrially injured City employees.

SRS will:

- **Ensure timely coordination** of second and third opinion evaluations for employees who dispute the diagnosis or treatment prescribed by their treating physician within the MPN;
- **Serve a copy of the written report** from the second or third opinion physician to the **employee, the City's Claims Representative, and the treating physician** within **twenty (20) days** of the appointment date or receipt of diagnostic test results, whichever is later;
- **Maintain documentation and tracking** of all second and third opinion requests and ensure compliance with all procedural and confidentiality requirements;
- **Support the City's Workers' Compensation Program** by facilitating transparent communication and timely reporting throughout the opinion review process.

SRS is committed to upholding regulatory standards and ensuring that City employees receive fair and thorough evaluations within the MPN framework.

17. Proposer shall provide an affirmation that the physician compensation is not structured in order to achieve the goal of reducing, delaying, or denying medical treatment or restricting access to medical treatment.

SRS affirms that **physician compensation within our organization is not structured to reduce, delay, or deny medical treatment**, nor to restrict access to medically necessary care for industrially injured City employees.

SRS is committed to:

- **Providing timely, evidence-based medical care** in accordance with the Medical Treatment Utilization Schedule (MTUS), which is presumptively correct on the scope and extent of treatment;
- **Ensuring that all compensation models** for employed and contracted physicians are designed to support quality care, clinical integrity, and compliance with California Workers' Compensation laws;

- **Maintaining transparency and accountability** in all aspects of medical decision-making and treatment authorization;
- **Complying fully with California Code of Regulations Title 8, including Section 9767.5.1 and Labor Code §139.21**, which govern MPN participation, physician conduct, and treatment access standards.

SRS is dedicated to supporting the City of San Diego’s workers’ compensation program with ethical, compliant, and patient-centered care.

18. For the duration of the Contract, Proposer shall appoint and maintain a Liaison, well-versed in California Worker Compensation laws, rules, and regulation, who shall:

SRS shall appoint and maintain a Liaison well-versed in California Worker’s Compensation laws, rules, and regulations. At this time Elsa Portillo serves as the Liaison to the City of San Diego. Elsa has 25 years of Occupational Medicine experience.

18.1 Respond to all inquiries by City Staff within 24 hours. Provider shall have a mutually agreeable escalation process for non-responsiveness and unresolved items.

SRS acknowledges and agrees that we will respond to all inquiries by the City Staff within 24. SRS will have a mutually agreeable escalation process for non-responsiveness and unresolved items.

18.2 Be the point person to help resolve issues that may arise with the City’s MPN, and treatment thereof and therefore must have knowledge of California Workers’ Compensation laws and regulations.

SRS agrees that the Liaison to the City will be the point person to help resolve issues that may arise with the City’s MPN, and treatment. The liaison must have knowledge of California Workers’ Compensation laws and regulations.

18.3 Assist with scheduling and coordinating Specialty appointments, as needed.

SRS acknowledges and agrees that the Liaison to the City will assist with scheduling and coordinating Specialty appointments, as needed.

18.4 Within 14 days of change, submit a City “MPN Physician” form (Attachment D) to the City’s designated MPN coordinator when a physician is no longer contracted with Proposer or when any physician change’s locations.

SRSMG acknowledges and agrees that the Liaison to the City will submit a City “MPN Physician” form within 14 days of a change to the City’s designated MPN coordinator when a physician is no longer contracted with SRSMG or when any physician change’s locations.

18.5 Submit a City “MPN Physician” form to the City’s designated MPN coordinator when a new physician is being considered for occupational medical services within their network or as a contracted specialty provider.

SRS will submit a City “MPN Physician” form to the City’s designated MPN coordinator when a new physician is being considered for occupational medical services within their network or as a contracted specialty provider.

18.6 Once monthly, compare the City’s online listing of designated MPN physicians to Proposer’s list of active physicians for any inconsistencies. Liaison shall confirm accuracy via email to the City’s MPN Coordinator.

SRS agrees that the Liaison to the City will once monthly compare the City’s online listing of designated MPN Physicians to the SRSMG list of active physicians for any inconsistencies. The Liaison to the City will confirm accuracy of the list via email to the City’s MPN Coordinator.

19. For the duration of the Contract, Proposer shall appoint and maintain a Specialty Care Coordinator who shall:

SRS acknowledges for the duration of the contract, we will appoint and maintain a dedicated Specialty Care Coordinator who will serve as the primary liaison for all specialty care needs. This individual will be responsible for:

19.1 Schedule and facilitate specialty care appointments.

SRS acknowledges that our Specialty Care Coordinators will proactively manage the scheduling of specialty care appointments, ensuring timely access to appropriate providers. They will maintain close communication with both the referring providers and specialty clinics to streamline the referral process and minimize delays.

19.2 Assist City claim staff in the coordination of specialty care appointments.

SRS acknowledges at the Coordinator will work collaboratively with City claim staff to support the coordination of specialty care services. This includes providing appointment updates, assisting with documentation needs, and ensuring that all communications are clear, timely, and HIPAA-compliant.

We are committed to delivering efficient, patient-centered specialty care coordination that supports the City’s operational goals and enhances the experience for injured workers.

20. Schedule and facilitate specialty care appointments. Assist City claim staff in the coordination of specialty care appointments. Proposer and all subcontractors shall refrain from sending any form of mail to City employees advertising their availability on the MPN and shall not independently market City Departments.

SRS will appoint and maintain a dedicated **Specialty Care Coordinator** for the duration of the contract. This individual will be responsible for:

- **Scheduling and Facilitating Specialty Care Appointments:**
SRS acknowledges that the Coordinator will ensure timely and efficient scheduling of specialty care services, working closely with providers within the Medical Provider Network (MPN) to support continuity of care and minimize delays.
- **Assisting City Claim Staff in Coordination:**
The SRS Coordinator will collaborate directly with City claim staff to support the coordination of specialty care appointments. This includes providing appointment updates, facilitating communication between stakeholders, and ensuring all documentation and scheduling needs are met promptly and professionally.
- **Compliance with Marketing Restrictions:**
SRS acknowledges and will fully comply with the City's directive that neither SRS nor any subcontractors shall send any form of mail to City employees advertising availability on the MPN. Furthermore, we will refrain from independently marketing to City Departments. All outreach and communication will be conducted strictly within the scope of authorized activities and in alignment with City policies.

Our team is committed to providing seamless specialty care coordination while maintaining full compliance with all contractual and ethical standards outlined by the City.

F. DOCUMENTATION AND REPORTS.

Proposer shall accurately maintain, store, and retrieve employee medical records during the period of this contract in accordance with all applicable laws and regulations. All documentation and reports shall be as required by law.

SRS understands and fully commits to the City's requirement that we shall accurately maintain, store, and retrieve employee medical records in accordance with all applicable laws and regulations throughout the duration of the contract.

Our organization adheres strictly to the following standards:

- **Confidentiality and Privacy Compliance:**
All employee medical records will be handled in compliance with the **Confidentiality of Medical Information Act (CMIA)** and relevant provisions of **HIPAA**, ensuring that sensitive health information is protected from unauthorized access or disclosure.
- **Secure Storage and Retention:**
Medical records will be securely stored—whether physical or electronic—with access restricted to authorized personnel only. Electronic records will be encrypted and maintained on secure servers with audit trails and user authentication

protocols. Records will be retained for a minimum of **seven years** following the last patient encounter, or longer if required for minors or specific legal circumstances.

- **Accurate Documentation and Legal Reporting:**

All documentation and reports will be completed in accordance with applicable laws, including California Code of Regulations Title 8, Section 3204, which governs access to employee exposure and medical records. We will ensure timely and accurate reporting, and proper documentation of medical evaluations, treatments, and communications.

Our team is committed to maintaining the highest standards of data integrity, confidentiality, and legal compliance in the management of employee medical records.

G. QUALIFICATIONS AND EXPERIENCE.

1. Proposer shall provide a California Physician's Assistant (PA) License for each Physician Assistant who will provide medical care to City Employees.

SRS agrees to provide a California Physician's Assistant (PA) License for each Physician Assistant who will provide medical care to City Employees.

2. Proposer shall agree to provide, when requested by the City, the written guidelines, or protocols for the medical tasks the Physician Assistant is allowed to perform, and the name of the physician assigned to supervise the job performance of the Physician Assistant.

SRS agrees to provide, upon request by the City, the written guidelines and protocols outlining the scope of medical tasks that our Physician Assistants (PAs) are authorized to perform. These guidelines are developed in accordance with California's Medical Board regulations and are reviewed regularly to ensure compliance and clinical appropriateness. Additionally, we will provide the name and credentials of the supervising physician assigned to oversee the PA's job performance, ensuring proper supervision and accountability in accordance with California law.

3. Proposer shall employ physicians and administrative staff who are conversant and knowledgeable in California Workers' Compensation laws and regulations and be able to verbally answer City Claim Staff questions with no additional cost to the City.

SRS employs physicians and administrative staff who are thoroughly conversant and knowledgeable in **California Workers' Compensation laws and regulations**, including Title 8 of the California Code of Regulations and relevant Labor Code provisions. These professionals are available to verbally respond to inquiries from City Claim Staff at no additional cost to the City. We are committed to supporting the City with accurate, timely, and legally compliant information to facilitate efficient claims management and care coordination.

4. Proposer must include the names and qualifications of all employees who will be involved in providing audiometric and respiratory fitness examinations. The Employees' experience in providing these or other similar services must also be included in a statement of qualifications.

SRS acknowledges that we must include the names and qualifications of all employees who will be involved in providing audiometric and respiratory fitness examinations. The Employees' experience in providing these or other similar services will also be included in a statement of qualifications.

H. REFERENCES.

Past performance will be verified by references demonstrating Proposers quality of the product or service, timeliness of performance, cost control, business practices, customer satisfaction and past performance of key personnel. References should demonstrate work of comparable size and complexity. References alternately may be used in determining responsibility of Proposer.

SRS acknowledges that past performance will be verified by references demonstrating that SRS's quality of the product or service, timeliness of performance, cost control, business practices, customer satisfaction and past performance of key personnel. SRS understands references should demonstrate work of comparable size and complexity and that references alternately may be used in determining responsibility of SRS.

Proposer must supply three (3) references for Industrial Medicine and three (3) references for Safety and Preventive services including Respiratory and Audiometric examinations. References are to be provided as part of the Contractor Standards Pledge of Compliance form (attach additional pages to the Contractor Standards Pledge of Compliance, as needed).

SRS acknowledges that we must supply three (3) references for Industrial Medicine and three (3) references for Safety and Preventive services including Respiratory and Audiometric examinations. We further understand that references are to be provided as part of the Contractor Standards Pledge of Compliance form.

Company Name: Port of San Diego
Contact Name and Phone Number: Steve Norby, 619-686-6236
Contact Email: snorby@portofsandiego.org
Address: 3165 Pacific Highway San Diego, CA 92101
Requirements of Contract: Industrial Medicine

Company Name: City of Chula Vista
Contact Name and Phone Number: Felipe Ladron De Guevara 619-585-5658
Contact Email: fladrondeguevara@chulavistaca.gov

Address: 276 Fourth Ave, Chula Vista, CA 91910
Requirements of Contract: Industrial Medicine

Company Name: City of Poway
Contact Name and Phone Number: Rodney Ortiz, 858-668-4464
Contact Email: rortiz@poway.org
Address: 13325 Civic Center Dr. Poway, CA 92074
Requirements of Contract: Safety and Preventive Services

Company Name: Joint Powers Authority (JPA)
Contact Name and Phone Number: Felicia Amenta, 951-318-3008
Contact Email: famenta@sdcoe.net
Address: 6401 Linda Vista Rd., San Diego, CA 92111
Requirements of Contract: Industrial Medical Services

Company Name: City of Murrieta
Contact Name and Phone Number: Kristin Schwartzkopf, 951-397-1166
Contact Email: kschwartzkopf@murrietaca.gov
Address: 1 Town Square, Murrieta CA, 92562
Requirements of Contract: Safety and Preventive Services

Company Name: City of Coronado
Contact Name and Phone Number: Aimee Cassadas, 619-522-7301
Contact Email: acassadas@coronado.ca.us
Address: 1825 Strand Way, Coronado CA, 92118
Requirements of Contract: Safety and Preventive Services

I. TECHNICAL REPRESENTATIVE.

The Technical Representative for this Contract is identified in the notice of award and is responsible for overseeing and monitoring this Contract.

SRS acknowledges that the Technical Representative for this Contract will be identified in the Notice of Award and will be responsible for overseeing and monitoring all aspects of the Contract. SRS is committed to maintaining open and timely communication with the designated Technical Representative to ensure full compliance with contractual obligations, performance standards, and reporting requirements. Our team will work collaboratively with the Technical Representative to support the successful execution and continuous improvement of services provided under this agreement.

J. PRICING SUBMITTAL.

Proposers shall submit their proposal for pricing on the following City's Price Proposal pages. Using the enclosed Price Proposal pages will help ensure consistency in the

price evaluation. The City's Price Proposal pages are to be completed in full for Sections 1-4. and shall be incorporated herein. Failure to complete the City's Price Proposal pages in full for Sections 1-4 shall be cause for proposal to be rejected as non-responsive. Any deviations from the Price Proposal pages shall be considered non-responsive and unacceptable.

Proposers may provide attachment worksheets, which include a breakdown of pricing and rationale used in their determination. However, price evaluation will be based on prices entered on the City's Price Proposal pages only. Blanks on the price proposal pages will be interpreted as zero (0), and no price will be allowed.

SRS acknowledges and fully understands the requirement to submit pricing using the City of San Diego's designated Price Proposal pages for Sections 1 through 4. SRS will complete all required sections in full, ensuring consistency and compliance with the City's pricing evaluation criteria.

We recognize that:

- **Only the prices entered on the City's Price Proposal pages will be used for evaluation.**
- **Any blanks will be interpreted as zero (0), and no price will be allowed.**
- **Failure to complete the Price Proposal pages in full or any deviation from the format will result in the proposal being deemed non-responsive.**

To support transparency and clarity, SRS may include supplemental attachment worksheets that provide a detailed breakdown of pricing and the rationale behind our cost determinations. These attachments are intended solely for informational purposes and will not be used in the formal price evaluation.

SRS is committed to submitting a complete, accurate, and responsive proposal in accordance with all RFP requirements.

Thank you for the opportunity to submit our proposal for Industrial Medicine Services. SRS is committed to delivering responsive, high-quality care to industrially injured City employees through a comprehensive, compliant, and patient-centered approach. Our investment in modern facilities, advanced medical equipment, and experienced Occupational Health professionals ensures that we are well-positioned to meet the evolving needs of your workforce. We look forward to the opportunity to collaborate and contribute to the health, safety, and productivity of your employees. Should you have any questions or require additional information, please do not hesitate to contact us.

ATTACHMENT A

Attachment A

(Affix Label Here)

INSTRUCTIONS: Employee must submit this form to Physician for completion at each Medical Evaluation.

City of San Diego Medical Status Report for Occupational Injury or Illness

EMPLOYEE			
PRINT NAME (LAST, FIRST, MI)	JOB CLASSIFICATION	SOCIAL SECURITY # (LAST 4)	PERM #
DEPARTMENT / DIVISION	DATE OF INJURY	REOCURRENCE OF OLD DISABILITY? ☐ Yes ☐ No	IMMEDIATE SUPERVISOR

BRIEF DESCRIPTION OF OCCUPATIONAL INJURY OR ILLNESS / EXPOSURE:

THE FOLLOWING IS AN UPDATE OF MY MEDICAL STATUS IN REGARD TO INDUSTRIAL LEAVE*, AND/OR LIGHT DUTY, TO PRESERVE MY BENEFITS UNDER THE APPROPRIATE PROGRAM, I WILL SUBMIT A MEDICAL STATUS REPORT EACH TIME I RECEIVE AUTHORIZED MEDICAL TREATMENT.

I HEREBY AUTHORIZE RELEASE OF MEDICAL INFORMATION REQUESTED BY MY EMPLOYER.

X

Employee Signature _____ Date _____ Phone Number _____

*INDUSTRIAL LEAVE IS SUBJECT TO APPROVAL BY RISK MANAGEMENT IN ACCORDANCE WITH A.R. 63.00.

PHYSICIAN						
TREATING PHYSICIAN (PRINT NAME)		ADDRESS			PHONE	
MARK ALL PRESCRIBED	DATE OF VISIT	TIME IN	TIME OUT	DID INJURY RESULT IN AGG. OF PRE-EXIST. NO INJ. CONDITION?	WORK RELATED INJURY?	INITIAL VISIT RECHECK FINAL VISIT
☐ Acupuncture ☐ Chiropractor ☐ Medications ☐ Physical Therapy				☐ Yes ☐ No	☐ Yes ☐ No	

- ☐ RETURN TO REGULAR WORK -- EFFECTIVE DATE: _____
- ☐ RETURN TO WORK WITH FOLLOWING RESTRICTIONS:
- ☐ NO DRIVING OF ANY COMMERCIAL VEHICLES

☐ NO WORKING NEAR MOVING MACHINERY

☐ NO PROLONGED SITTING

☐ NO PROLONGED STANDING AND WALKING

☐ ELEVATE INJURED EXTREMITY TO DECREASE SWELLING

☐ SITTING WORK ONLY

☐ NO KNEELING OR SQUATTING

☐ NO REPETITIVE CLIMBING, BENDING OR TWISTING

☐ WEIGHT LIFTING RESTRICTIONS _____ LBS.

☐ SEDENTARY WORK ONLY

☐ LIMITED USE OF RIGHT/LEFT HAND/UPPER EXTREMITY

☐ LIMITED PUSHING/PULLING/GRASPING OF RIGHT/LEFT HAND

☐ REPETITIVE HAND/WRIST WORK LIMITED TO _____

☐ KEYBOARD WORK LIMITED TO _____

☐ CAN WORK IN SPLINTS/SUPPORT ONLY AS NEEDED

☐ HAND/NECK/BACK STRETCHING BREAKS FOR _____

☐ ROTATE JOB TASKS TO MINIMIZE CONTINUOUS REPETITIVE HAND/WRIST MOTION

☐ NO OVERHEAD LIFTING OR REACHING WITH RIGHT/LEFT UPPER EXTREMITY

☐ NO OVERHEAD WORK

☐ AVOID PROLONGED NECK FLEXED/EXTENDED POSTURE

☐ OTHER: _____
- ☐ UNABLE TO PERFORM ANY WORK ACTIVITIES AT THIS TIME. ESTIMATED DURATION: _____

PHYSICIAN SIGNATURE _____ NEXT APPT. DATE _____

PHYSICAL THERAPY					
DATE	TIME IN	TIME OUT	DATE	TIME IN	TIME OUT

PAYROLL		
INCLUDE DATES OF ABSENCE:	FIRST DATE	LAST DATE

DEPARTMENT	
LIGHT DUTY:	☐ IS ☐ IS NOT AVAILABLE AT THIS TIME

RECOMMEND: ☐ APPROVED ☐ DISAPPROVED ☐ PENDING

Division Head or Designee or Light Duty Coordinator-Print Name / Signature _____

ATTACHMENT B

RFP 10090302-26-L

Attachment B - List of Physicians

Name of Proposer:		Sharp Rees-Stealy Medical Group, Inc.					
Physician Name	Specialty	Physical Street Address	City	State	Zip Code	Any MPN Medical Group Affiliations	Assigned Provider Code
Lisa Gleason, M.D.	Cardiologists	2929 Health Center Dr	San Diego	CA	92123	Sharp Rees-Stealy	MISC
Paym Mehranpour, M.D.	Cardiologists	752 Medical Center Ct #207	Chula Vista	CA	91911	Sharp Rees-Stealy	MISC
Dimitri A. Sherev, M.D.	Cardiologists	752 Medical Center Ct #207	Chula Vista	CA	91911	Sharp Rees-Stealy	MISC
Mihir Barvalia, M.D.	Cardiologists	752 Medical Center Ct #207	Chula Vista	CA	91911	Sharp Rees-Stealy	MISC
Farah Dawood, M.D.	Cardiologists	752 Medical Center Ct #207	Chula Vista	CA	91911	Sharp Rees-Stealy	MISC
Genaro Fernandez, M.D.	Cardiologists	752 Medical Center Ct #207	Chula Vista	CA	91911	Sharp Rees-Stealy	MISC
Jesse Naghi, M.D.	Cardiologists	752 Medical Center Ct #207	Chula Vista	CA	91911	Sharp Rees-Stealy	MISC
Pavan Reddy, M.D.	Cardiologists	752 Medical Center Ct #207	Chula Vista	CA	91911	Sharp Rees-Stealy	MISC
Dimitri A. Sherev, M.D.	Cardiologists	8851 Center Dr #304	La Mesa	CA	91942	Sharp Rees-Stealy	MISC
Mihir Barvalia, M.D.	Cardiologists	8851 Center Dr #304	La Mesa	CA	91942	Sharp Rees-Stealy	MISC
Farah Dawood, M.D.	Cardiologists	8851 Center Dr #304	La Mesa	CA	91942	Sharp Rees-Stealy	MISC
Genaro Fernandez, M.D.	Cardiologists	8851 Center Dr #304	La Mesa	CA	91942	Sharp Rees-Stealy	MISC
Jesse Naghi, M.D.	Cardiologists	8851 Center Dr #304	La Mesa	CA	91942	Sharp Rees-Stealy	MISC
Pavan Reddy, M.D.	Cardiologists	8851 Center Dr #304	La Mesa	CA	91942	Sharp Rees-Stealy	MISC
Dimitri A. Sherev, M.D.	Cardiologists	1380 El Cajon Blvd Ste 100	El Cajon	CA	92020	Sharp Rees-Stealy	MISC
Mihir Barvalia, M.D.	Cardiologists	1380 El Cajon Blvd Ste 100	El Cajon	CA	92020	Sharp Rees-Stealy	MISC
Farah Dawood, M.D.	Cardiologists	1380 El Cajon Blvd Ste 100	El Cajon	CA	92020	Sharp Rees-Stealy	MISC
Genaro Fernandez, M.D.	Cardiologists	1380 El Cajon Blvd Ste 100	El Cajon	CA	92020	Sharp Rees-Stealy	MISC
Jesse Naghi, M.D.	Cardiologists	1380 El Cajon Blvd Ste 100	El Cajon	CA	92020	Sharp Rees-Stealy	MISC
Pavan Reddy, M.D.	Cardiologists	1380 El Cajon Blvd Ste 100	El Cajon	CA	92020	Sharp Rees-Stealy	MISC
Dimitri A. Sherev, M.D.	Cardiologists	2095 W. Vista Way Ste 107	Vista	CA	92083	Sharp Rees-Stealy	MISC
Mihir Barvalia, M.D.	Cardiologists	2095 W. Vista Way Ste 107	Vista	CA	92083	Sharp Rees-Stealy	MISC
Genaro Fernandez, M.D.	Cardiologists	2095 W. Vista Way Ste 107	Vista	CA	92083	Sharp Rees-Stealy	MISC
Jesse Naghi, M.D.	Cardiologists	2095 W. Vista Way Ste 107	Vista	CA	92083	Sharp Rees-Stealy	MISC
Pavan Reddy, M.D.	Cardiologists	2095 W. Vista Way Ste 107	Vista	CA	92083	Sharp Rees-Stealy	MISC
Antoanella Calame, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Christopher Erickson, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Julie Gladsjo, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Davika Icecreamwala, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Swati Kannan, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Vienna Katana, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Lisa Lowe Hiller, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Willis Lyford, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Robert Peppercorn, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Rudy Schmiedecke, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Nikki Tang, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Shannon Webb, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Matthew Willett, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC

Matthew Willett, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Kevin Wright, M.D.	Dermatology	6605 Nancy Ridge Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Mark J. Sherman, M.D.	General Surgery	9850 Genesee Ave #660	La Jolla	CA	92037	Sharp Rees-Stealy	MISC
William Contreras, M.D.	Hospitalists	1400 East Palomar Street	Chula Vista	CA	91913	Sharp Rees-Stealy	MISC
Carson Drouin, M.D.	Hospitalists	2929 Health Center Dr	San Diego	CA	92123	Sharp Rees-Stealy	MISC
Scott E. Patterson, M.D.	Hospitalists	2929 Health Center Dr	San Diego	CA	92123	Sharp Rees-Stealy	MISC
Nhan V. Trang, M.D.	Hospitalists	2929 Health Center Dr	San Diego	CA	92123	Sharp Rees-Stealy	MISC
Kelly M. Askim, M.D.	Neurologist	2020 Genesee Ave 2nd floor	San Diego	CA	92123	Sharp Rees-Stealy	NEURO
Justin Dominick, M.D.	Neurologist	16899 West Bermanrdo Road	San Diego	CA	92127	Sharp Rees-Stealy	NEURO
Jeremy Hogan, M.D.	Neurologist	5525 Grossmont Center Dr	La Mesa	CA	91942	Sharp Rees-Stealy	NEURO
Erik Perkins, M.D.	Neurologist	5525 Grossmont Center Dr	La Mesa	CA	91942	Sharp Rees-Stealy	NEURO
Kenneth Villa, M.D.	Neurologist	525 Third Ave	Chula Vista	CA	91910	Sharp Rees-Stealy	NEURO
William J. Bigham, M.D.	Ophthalmology	9850 Genesee Ave, Ste 310	La Jolla	CA	92037	Sharp Rees-Stealy	MISC
Daniel J. Coden, M.D.	Ophthalmology	9850 Genesee Ave, Ste 310	La Jolla	CA	92037	Sharp Rees-Stealy	MISC
Arthur C. Perry, M.D.	Ophthalmology	9850 Genesee Ave, Ste 310	La Jolla	CA	92037	Sharp Rees-Stealy	MISC
Steven Pratt, M.D.	Ophthalmology	9850 Genesee Ave, Ste 310	La Jolla	CA	92037	Sharp Rees-Stealy	MISC
John E. Bokusky, M.D.	Ophthalmology	3939 3RD Ave	San Diego	CA	92103	Sharp Rees-Stealy	MISC
Neil T. Choplin, M.D.	Ophthalmology	3939 3RD Ave	San Diego	CA	92103	Sharp Rees-Stealy	MISC
Asa D. Morton, M.D.	Ophthalmology	3939 3RD Ave	San Diego	CA	92103	Sharp Rees-Stealy	MISC
Robert M. Thomas, M.D.	Ophthalmology	3939 3RD Ave	San Diego	CA	92103	Sharp Rees-Stealy	MISC
Cristiana Vasile, M.D.	Ophthalmology	3939 3RD Ave	San Diego	CA	92103	Sharp Rees-Stealy	MISC
Cristiana Vasile, M.D.	Ophthalmology	700 West El Norte Parkway	Escondido	CA	92026	Sharp Rees-Stealy	MISC
John E. Bokusky, M.D.	Ophthalmology	700 West El Norte Parkway	Escondido	CA	92026	Sharp Rees-Stealy	MISC
Neil T. Choplin, M.D.	Ophthalmology	700 West El Norte Parkway	Escondido	CA	92026	Sharp Rees-Stealy	MISC
Asa D. Morton, M.D.	Ophthalmology	700 West El Norte Parkway	Escondido	CA	92026	Sharp Rees-Stealy	MISC
Cristiana Vasile, M.D.	Ophthalmology	9834 Genesee Ave., Ste 428	La Jolla	CA	92037	Sharp Rees-Stealy	MISC
John E. Bokusky, M.D.	Ophthalmology	9834 Genesee Ave., Ste 428	La Jolla	CA	92037	Sharp Rees-Stealy	MISC
Neil T. Choplin, M.D.	Ophthalmology	9834 Genesee Ave., Ste 428	La Jolla	CA	92037	Sharp Rees-Stealy	MISC
Nickolet Boermans, O.D.	Optometrists	3939 3RD Ave	San Diego	CA	92123	Sharp Rees-Stealy	MISC
Sara Julazadeh, O.D.	Optometrists	3939 3RD Ave	San Diego	CA	92123	Sharp Rees-Stealy	MISC
Adriana A. Sanchez, O.D.	Optometrists	3939 3RD Ave	San Diego	CA	92123	Sharp Rees-Stealy	MISC
Phillip M. Taunton, O.D.	Optometrists	3939 3RD Ave	San Diego	CA	92123	Sharp Rees-Stealy	MISC
Nickolet Boermans, O.D.	Optometrists	9834 Genesee Ave., Ste 428	La Jolla	CA	92037	Sharp Rees-Stealy	MISC
Sara Julazadeh, O.D.	Optometrists	700 West El Norte Parkway	Escondido	CA	92026	Sharp Rees-Stealy	MISC
Adriana A. Sanchez, O.D.	Optometrists	700 West El Norte Parkway	Escondido	CA	92026	Sharp Rees-Stealy	MISC
Brooke Ballard, M.D.	Orthopedic	277 Rancheros Drive #101	San Marcos	CA	92069	NONE	ORTHO
Scott K. Tanaka, M.D.	Orthopedic	4060 Fourth Ave. #700	San Diego	CA	92103	Sharp Rees-Stealy	ORTHO
Andrew Erwtaman, M.D.	Orthopedic	7485 Mission Valley Road	San Diego	CA	92108	Sharp Rees-Stealy	ORTHO
Drew Peterson, M.D.	Orthopedic	7485 Mission Valley Road	San Diego	CA	92108	Sharp Rees-Stealy	ORTHO
Michael Sun, M.D.	Orthopedic	7485 Mission Valley Road	San Diego	CA	92108	Sharp Rees-Stealy	ORTHO
Saiyun Hou, M.D.	Pain Management	5348 Carroll Canyon Road	San Diego	CA	92121	Sharp Rees-Stealy	PM
Michael Moon, M.D.	Pain Management	5348 Carroll Canyon Road	San Diego	CA	92121	Sharp Rees-Stealy	PM
Jeffry Jacob Mercado, M.D.	Pain Management	6719 Alvarado Road Ste 308	San Diego	CA	92120	Sharp Rees-Stealy	PM
Jeffry Jacob Mercado, M.D.	Pain Management	501N El Camino Real Ste 201	Encinitas	CA	92029	Sharp Rees-Stealy	PM
Jeffry Jacob Mercado, M.D.	Pain Management	1671 West Main Strett	El Centro	CA	92243	Sharp Rees-Stealy	PM
Robert Scott, M.D.	Pain Management/Physical	9834 Genesee Ave., Ste 223B	La Jolla	CA	92037	Sharp Rees-Stealy	PMR
Kevin Toliver, M.D.	Pain Management	4060 Fourth Ave. #700	San Diego	CA	92103	Sharp Rees-Stealy	PM

Kent Feldman, D.P.M.	Podiatrist	3444 Kearny Villa Road, Ste 404	San Diego	CA	92123	Sharp Rees-Stealy	DPM
Amir Hajmirsadeghi, D.P.M.	Podiatrist	16950 Via Tazon	San Diego	CA	92127	Sharp Rees-Stealy	DPM
Michael Quinn, D.P.M.	Podiatrist	7485 Mission Valley Road	San Diego	CA	92108	Sharp Rees-Stealy	DPM
Anthony Biascan, D.O.	occupational Physician Primary Care	5525 Grossmont Center Dr	La Mesa	CA	91942	Sharp Rees-Stealy	OCCM
Kathy Head, M.D.	occupational Physician Primary Care	16950 Via Tazon	San Diego	CA	92127	Sharp Rees-Stealy	OCCM
Stephen Munday, M.D.	occupational Physician Primary Care	2020 Genesee Ave 2nd floor	San Diego	CA	92123	Sharp Rees-Stealy	OCCM
Tiffany Shay, M.D.	occupational Physician Primary Care	525 Third Ave	Chula Vista	CA	91910	Sharp Rees-Stealy	OCCM
Ashley Ennedy, D.O.	occupational Physician Primary Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	OCCM
Kathlyn Ignacio, M.D.	occupational Physician Primary Care	525 Third Ave	Chula Vista	CA	91910	Sharp Rees-Stealy	OCCM
Timothy Lawler, D.O.	occupational Physician	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	OCCM
Stacy Aquipel, Psy. D	Psychiatry/Psychology	3636 Fourth Ave., Ste 310	San Diego	CA	92103	Sharp Rees-Stealy	PSYCH
Einat Brenner, Ph. D	Psychiatry/Psychology	3636 Fourth Ave., Ste 310	San Diego	CA	92103	Sharp Rees-Stealy	PSYCH
Takisha Corbett, Ph. D	Psychiatry/Psychology	3636 Fourth Ave., Ste 310	San Diego	CA	92103	Sharp Rees-Stealy	PSYCH
Natalie Kurniadi, Ph. D	Psychiatry/Psychology	3636 Fourth Ave., Ste 310	San Diego	CA	92103	Sharp Rees-Stealy	PSYCH
Van John Nguyen, Ph. D	Psychiatry/Psychology	3636 Fourth Ave., Ste 310	San Diego	CA	92103	Sharp Rees-Stealy	PSYCH
Angela Patino, Psy. D	Psychiatry/Psychology	3636 Fourth Ave., Ste 310	San Diego	CA	92103	Sharp Rees-Stealy	PSYCH
Delia M Silva, PsyD & Neuropsychology	Psychiatry/Psychology	3636 Fourth Ave., Ste 310	San Diego	CA	92103	Sharp Rees-Stealy	PSYCH
Robindra Paul, M.D.	Psychiatry/Psychology	8880 Rio San Diego Drive #800	San Diego	CA	92108	Sharp Rees-Stealy	PSYCH
Maneesh Bawa, M.D.	Spine Specialists	4060 Fourth Ave. #700	San Diego	CA	92103	Sharp Rees-Stealy	MISC
Rafid Kasir, M.D.	Spine Specialists	4060 Fourth Ave. #700	San Diego	CA	92103	Sharp Rees-Stealy	MISC
Paul Kim, M.D.	Spine Specialists	6719 Alvarado Road Ste 308	San Diego	CA	92120	Sharp Rees-Stealy	MISC
Paul Kim, M.D.	Spine Specialists	1671 West Main Strett	El Centro	CA	92243	Sharp Rees-Stealy	MISC
Paul Kim, M.D.	Spine Specialists	501 N El Camino Real	Encinitas	CA	92024	Sharp Rees-Stealy	MISC
Paul Kim, M.D.	Spine Specialists	2125 Citricado Parkway Ste 310	Escondido	CA	92029	Sharp Rees-Stealy	MISC
Paul Kim, M.D.	Spine Specialists	6185 Paseo Del Norte #140	Carlsbad	CA	92011	Sharp Rees-Stealy	MISC
Ramin Raiszadeh, M.D.	Spine Specialists	6719 Alvarado Road Ste 308	San Diego	CA	92120	Sharp Rees-Stealy	MISC
Ramin Raiszadeh, M.D.	Spine Specialists	1671 West Main Strett	El Centro	CA	92243	Sharp Rees-Stealy	MISC
Ramin Raiszadeh, M.D.	Spine Specialists	501 N El Camino Real	Encinitas	CA	92024	Sharp Rees-Stealy	MISC
Ramin Raiszadeh, M.D.	Spine Specialists	2125 Citricado Parkway Ste 310	Escondido	CA	92029	Sharp Rees-Stealy	MISC
Ramin Raiszadeh, M.D.	Spine Specialists	6185 Paseo Del Norte #140	Carlsbad	CA	92011	Sharp Rees-Stealy	MISC
Mark Nelson, M.D.	Spine Specialists	9834 Genesee Ave, Ste 223	La Jolla	CA	92037	Sharp Rees-Stealy	MISC
Danny Keller M.D.	Urologists	3444 Kearny Villa Road, Ste 202	San Diego	CA	92123	Sharp Rees-Stealy	MISC
Sara Amen, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Vasiliki Anvari, M.D.	Urgent Care	525 Third Ave	Chula Vista	CA	91910	Sharp Rees-Stealy	MISC
Jennifer Avila, M.D.	Urgent Care	8701 Cuyamaca St	Santee	CA	2071-425	Sharp Rees-Stealy	MISC
Amelia Bahamonde, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Andrew Baldwin, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Samantha Bamber, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Ma Lovely Batasin, D.O.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Sandeep Bodge, D.O.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Natasha Boydston, D.O.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Caitlin Bradshaw, D.O.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Colleen Buono, M.D.	Urgent Care	525 Third Ave	Chula Vista	CA	91910	Sharp Rees-Stealy	MISC
Taylor Burch Barnikel, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Ulysses Carino, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Daniel Chang, D.O.	Urgent Care	8701 Cuyamaca St	Santee	CA	92071	Sharp Rees-Stealy	MISC

Daniel Chang, D.O.	Urgent Care	8701 Cuyamaca St	Santee	CA	92071	Sharp Rees-Stealy	MISC
Dallas Chase, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Isabelle Chughtai-Harvey, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Garfield Cross, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Gerard Demers, D.O.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Colin Dougherty, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Paula Dozzi, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Marife Dy Stroika, M.D.	Urgent Care	525 Third Ave	Chula Vista	CA	91910	Sharp Rees-Stealy	MISC
Christopher Fernandez Del Riego, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Scott Flinn, M.D.	Urgent Care	8701 Cuyamaca St	Santee	CA	92071	Sharp Rees-Stealy	MISC
William Fornaciari, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Fadi Georges, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Gary Gluck, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Carmen Gupta, M.D.	Urgent Care	8701 Cuyamaca St	Santee	CA	2071-425	Sharp Rees-Stealy	MISC
Anna Hackenberg, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
J. Heaton, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Jessica Hill, M.D.	Urgent Care	8701 Cuyamaca St	Santee	CA	92071	Sharp Rees-Stealy	MISC
Timothy Hinman, M.D.	Urgent Care	8701 Cuyamaca St	Santee	CA	92071	Sharp Rees-Stealy	MISC
Rick Huang, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Elias Jaraicie, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	2127-160	Sharp Rees-Stealy	MISC
Kianoush Javaheri, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Anna Julien, D.O.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Lisa Kelly, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	2121-631	Sharp Rees-Stealy	MISC
Jane Kim, D.O.	Urgent Care	8701 Cuyamaca St	Santee	CA	92071	Sharp Rees-Stealy	MISC
Erin King, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Gene Lee, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Ryna Limberg, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Linda Liu, M.D.	Urgent Care	525 Third Ave	Chula Vista	CA	91910	Sharp Rees-Stealy	MISC
Eric Lovell, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Cassandra Lowry, D.O.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Aleksandr Lyubasyuk, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Tatiana Mamantov, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Erik Martin, M.D.	Urgent Care	1400 E Palomar St	Chula Vista	CA	91913	Sharp Rees-Stealy	MISC
Rebeca Martin, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Kathryn Maxwell, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Efren Nierva, D.O.	Urgent Care	525 Third Ave	Chula Vista	CA	91910	Sharp Rees-Stealy	MISC
Louis Orosz, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Jason Palmer, D.O.	Urgent Care	8701 Cuyamaca St	Santee	CA	92071	Sharp Rees-Stealy	MISC
Peter Park, M.D.	Urgent Care	8701 Cuyamaca St	Santee	CA	2071-425	Sharp Rees-Stealy	MISC
Uyen Pham Le, D.O.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Elisabeth Plotner, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Murtaza Rajabali, M.D.	Urgent Care	1400 E Palomar St	Chula Vista	CA	91913	Sharp Rees-Stealy	MISC
Jason Roby, D.O.	Urgent Care	8701 Cuyamaca St	Santee	CA	92071	Sharp Rees-Stealy	MISC
Michael Rundell, D.O.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Andrew Rusnak, M.D.	Urgent Care	525 Third Ave	Chula Vista	CA	91910	Sharp Rees-Stealy	MISC

Donald Saltee, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Shahed Samadi, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Mahesh Sandhu, D.O.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Patrick Sandford, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Lisa Schnurr, D.O.	Urgent Care	8701 Cuyamaca St	Santee	CA	92071	Sharp Rees-Stealy	MISC
Douglas Schulz, M.D.	Urgent Care	8701 Cuyamaca St	Santee	CA	92071	Sharp Rees-Stealy	MISC
Azadeh Shirazi, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Daniel Smith, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Brian Steiner, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Bhakti Tantod, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Paula Trepman, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Matilde Venero, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Nicholas Ward, M.D.	Urgent Care	10243 Genetic Center Dr	San Diego	CA	92121	Sharp Rees-Stealy	MISC
Nicholus Warstadt, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Katherine Wikholm, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Christopher Xavier, M.D.	Urgent Care	16899 W Bernardo Dr	San Diego	CA	92127	Sharp Rees-Stealy	MISC
Stephanie Yen, M.D.	Urgent Care	300 Fir St	San Diego	CA	92101	Sharp Rees-Stealy	MISC
Amy Zheng, M.D.	Urgent Care	1400 E Palomar St	Chula Vista	CA	91913	Sharp Rees-Stealy	MISC
Gabriel Zimmerer, M.D.	Urgent Care	525 Third Ave	Chula Vista	CA	91910	Sharp Rees-Stealy	MISC
John A. Toro, D.C.	Chiropractic	8222 Vickers St #108	San Diego	CA	92111	Sharp Rees-Stealy	DC
Mario Mancini, Lic. AC.	Acupuncture	3547 Camino Del Rio South	San Diego	CA	92108	Sharp Rees-Stealy	LAC

ATTACHMENT C

RFP 10090302-26-L

Attachment C - Ancillary Service Provider

Name of Proposer: p Rees-Stealy Medical Group, Inc.

By submission of this ancillary service information, Proposer is confirming that they are legally permitted to offer the required medical goods/services and that an existing contractual agreement exists between the Proposer and each listed ancillary service provider that will provide services for the City's MPN (Medical Provider Network).

Ancillary Service Provider	Specialty or Type of Service	Physical Address	City	State	Zip Code	License Number or Certification to Practice	Tax Identification Number (TIN)
Brittany Everroad	Occupational Therapy	18839 West Bernadro Drive	San Diego	CA	92127	18839	33-0106028
Brenda Fadeyibi	Occupational Therapy	525 Third Ave	Chula Vista	CA	91910	22760	33-0106028
Kimberly Guerrero	Occupational Therapy	9610 Granite Ridge Dr, Ste C	San Diego	CA	92123	24239	33-0106028
Eunice Oh	Occupational Therapy	8701 Cuyamaca St	Santee	CA	92071	17956	33-0106028
Angela Witucki	Occupational Therapy	9610 Granite Ridge Dr	San Diego	CA	92123-2684	3375	33-0106028
Andrea Adriany	Physical Therapy	300 Fir St	San Diego	CA	92101	14290	33-0106028
Ambert Alkema	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071-4253	293333	33-0106028
Melanie Angeles	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913	33104	33-0106028
Kevina Au	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	302185	33-0106028
Jason Averilla	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	42767	33-0106028
Eryn Bannister	Physical Therapy	9610 Granite Ridge Dr	San Diego	CA	92123	35428	33-0106028
Chantal Berger	Physical Therapy	9610 Granite Ridge Dr	San Diego	CA	92123-2684	304628	33-0106028
Andrea Brady	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127-1603	304194	33-0106028
Anastasia Brown	Physical Therapy	300 Fir St	San Diego	CA	92101-2327	29191	33-0106028
Rhad Brown	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	29182	33-0106028
Teresa Burdick	Physical Therapy	300 Fir St	San Diego	CA	92101	29359	33-0106028
Michelle Cacho	Physical Therapy	9610 Granite Ridge Dr	San Diego	CA	92123-2684	299395	33-0106028
Sandra Campbell	Physical Therapy	300 Fir St	San Diego	CA	92101	12328	33-0106028
Monica Castagnetti	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	38738	33-0106028
Samuel Cauble	Physical Therapy	344 F Street, Ste 300	Chula Vista	CA	91910	299517	33-0106028
Wendy Chiu	Physical Therapy	344 F Street, Ste 300	Chula Vista	CA	91910	42002	33-0106028
Tiffany Chung	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913	300008	33-0106028
Skylar Clark	Physical Therapy	300 Fir St	San Diego	CA	92101	302385	33-0106028
Candice Claudio	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913	26793	33-0106028
Makayla Corpus	Physical Therapy	10243 Genetic Center Dr	San Diego	CA	92121	304382	33-0106028
Donovan Curtis	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127	43274	33-0106028
Joel Dager	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913-1800	27298	33-0106028
Jessica Davis	Physical Therapy	9610 Granite Ridge Dr	San Diego	CA	92123	300184	33-0106028
David Carmelo De Leon	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	296289	33-0106028
Renee Delasalas	Physical Therapy	300 Fir St	San Diego	CA	92101	34650	33-0106028
Michelle Doyle	Physical Therapy	9610 Granite Ridge Dr	San Diego	CA	92123-2684	15943	33-0106028
Ashley Elgas	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127-1603	37296	33-0106028
Ashely Ferguson	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	308061	33-0106028
Sheila Ferris	Physical Therapy	300 Fir St	San Diego	CA	92101-2327	23434	33-0106028

Julio Fuentes	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127	36676	33-0106028
Lindsay Gaspari	Physical Therapy	344 F Street, Ste 300	Chula Vista	CA	91910	298972	33-0106028
Kristine Georgie	Physical Therapy	10243 Genetic Center Dr	San Diego	CA	92121-6310	33291	33-0106028
Tiffany Glover	Physical Therapy	10243 Genetic Center Dr	San Diego	CA	92121	28421	33-0106028
Alexander Gopez	Physical Therapy	9610 Granite Ridge Dr., Ste A	San Diego	CA	92123	301726	33-0106028
Cynthia Grauf	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	17647	33-0106028
John Gray	Physical Therapy	9610 Granite Ridge Dr., Ste C	San Diego	CA	92123	17848	33-0106028
Michelle Hansen	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127	37325	33-0106028
Stephanie Hebbel	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127-1603	29023	33-0106028
Julia Heyer	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	293242	33-0106028
Paul Hodge	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	39528	33-0106028
Nancy Howe	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	27919	33-0106028
Taylor Humecky	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	298735	33-0106028
Vanessa Hunter	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	42675	33-0106028
Marla Huott	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127-1603	38393	33-0106028
Nancy Jungling	Physical Therapy	300 Fir St	San Diego	CA	92101-2327	24263	33-0106028
Mahshid Karami	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	302522	33-0106028
Kerri Kill	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	40835	33-0106028
Lynn Komar	Physical Therapy	9610 Granite Ridge Dr	San Diego	CA	92123	18531	33-0106028
Ewa Kopec	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127	292925	33-0106028
Morgan Kurtz	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127	301501	33-0106028
Brandon Kusakabe	Physical Therapy	9610 Granite Ridge Dr	San Diego	CA	92123	40947	33-0106028
Karen Kay Lalangan	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913	302470	33-0106028
Jennifer Landini	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	295489	33-0106028
Victor Larios	Physical Therapy	9610 Granite Ridge Dr	San Diego	CA	92123	295255	33-0106028
Hoang Le	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913-1800	300354	33-0106028
Laura Lynn	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913	39004	33-0106028
Brennan McLaughlin	Physical Therapy	10243 Genetic Center Dr	San Diego	CA	92121	302082	33-0106028
Melissa Mora	Physical Therapy	300 Fir St	San Diego	CA	92101	40828	33-0106028
Casey Moran	Physical Therapy	10243 Genetic Center Dr	San Diego	CA	92121	296196	33-0106028
Seanalexis Nafarrete	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913	303367	33-0106028
Noe Nava	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913	20318	33-0106028
Clint Nhan	Physical Therapy	10243 Genetic Center Dr	San Diego	CA	92121	301521	33-0106028
Nicole Norenberg	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	40118	33-0106028
Heidi Olinger	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	23541	33-0106028
Heather Onate	Physical Therapy	300 Fir St	San Diego	CA	92101	38756	33-0106028
Derrick-Elijah Oriondo	Physical Therapy	9610 Granite Ridge Dr., Ste C	San Diego	CA	92123	299540	33-0106028
Phaysane Oudom	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	32527	33-0106028
Lauren Pai-Gonzales	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	303030	33-0106028
Matthew Pedrotti	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	42452	33-0106028
Albert Quiba	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	39115	33-0106028
Nigell Reyes	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127	304010	33-0106028
Marc Robinson	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	40833	33-0106028
Stewart Sanders	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	32303	33-0106028

Ashley See	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913-1800	293525	33-0106028
Kimberly Setzler	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127	23293	33-0106028
Tamarcia Shaffer	Physical Therapy	1400 E Palomar St	Chula Vista	CA	91913	30256	33-0106028
Benjamin Smith	Physical Therapy	300 Fir St	San Diego	CA	92101	39189	33-0106028
Ruth Steinhauer	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	20685	33-0106028
Erin Stone	Physical Therapy	9610 Granite Ridge Dr	San Diego	CA	92123	35403	33-0106028
Debra Thirion	Physical Therapy	10243 Genetic Center Dr	San Diego	CA	92121-6310	26778	33-0106028
Ylan Ton	Physical Therapy	10243 Genetic Center Dr	San Diego	CA	92121	295387	33-0106028
Tamara Trily	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	294448	33-0106028
Daniel Tucker	Physical Therapy	525 Third Ave	Chula Vista	CA	91910	20759	33-0106028
Cathleen Uzunoglu	Physical Therapy	300 Fir St	San Diego	CA	92101	40415	33-0106028
Matthew Vaia	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127	37290	33-0106028
Charles Van Meter	Physical Therapy	10243 Genetic Center Dr	San Diego	CA	92121	20187	33-0106028
Keri Von Kalinowski	Physical Therapy	9610 Granite Ridge Dr	San Diego	CA	92123	37141	33-0106028
Amanda Whalen	Physical Therapy	8701 Cuyamaca St	Santee	CA	92071	293941	33-0106028
Erin Whitaker	Physical Therapy	16899 W Bernardo Dr	San Diego	CA	92127	22183	33-0106028
Talia Wulkowicz	Physical Therapy	344 F Street, Ste 300	Chula Vista	CA	91910	32879	33-0106028
Clay Bowland, M.D.	Radiology	8933 Activity Road	San Diego	CA	92126	A138073	33-0106028
Charlton Byun, M.D.	Radiology	300 Fir St	San Diego	CA	92101	A45999	33-0106028
Anthony Chang, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	C54035	33-0106028
Jane Conlin, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	A121458	33-0106028
Shanoe Cutts, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	A88329	33-0106028
Jade De Guzman	Radiology	300 Fir St	San Diego	CA	92101-2327	A78637	33-0106028
Amber Dechambeau, D.O.	Radiology	8933 Activity Rd	San Diego	CA	92126	A102678	33-0106028
Curtis Duffield, M.D.	Radiology	300 Fir St	San Diego	CA	92101	20A14879	33-0106028
Dawn Engelkemier, M.D.	Radiology	300 Fir St	San Diego	CA	92101-2327	A97873	33-0106028
Kathleen Flores Dahms, M.D.	Radiology	300 Fir St	San Diego	CA	92101-2327	A108096	33-0106028
Eric Goodman, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	A54880	33-0106028
Robert Haynes, M.D.	Radiology	1400 E Palomar St	Chula Vista	CA	91913	A77239	33-0106028
Gene Heard, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	G49592	33-0106028
Barbara Hsu, M.D.	Radiology	300 Fir St	San Diego	CA	92101-2327	G55696	33-0106028
Marine Kremer Prill, M.D.	Radiology	300 Fir St	San Diego	CA	92101	G62660	33-0106028
Valentin Lance, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	A109358	33-0106028
Margaret Lee, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	A118759	33-0106028
Patrick Lee, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126-4427	A79768	33-0106028
Benjamin Lehmann, D.O.	Radiology	8933 Activity Rd	San Diego	CA	92126	A103149	33-0106028
Barry Lumkin, M.D.	Radiology	300 Fir St	San Diego	CA	92101	20A23150	33-0106028
Jill Meoni, M.D.	Radiology	300 Fir St	San Diego	CA	92101	G67349	33-0106028
Mihael Pop, M.D.	Radiology	300 Fir St	San Diego	CA	92101	A55229	33-0106028
Katherine Richman, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	A104428	33-0106028
Steve Rindsberg, M.D.	Radiology	300 Fir St	San Diego	CA	92101	G80333	33-0106028
Andrew Robbins, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	C42733	33-0106028
Nelly Salem, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	G68171	33-0106028

Robert Stoffey, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	A119378	33-0106028
Lily Tang, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	20A15857	33-0106028
Stephen Thomas, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	A85784	33-0106028
Andrea Vergara Finger, M.D.	Radiology	8933 Activity Rd	San Diego	CA	92126	C161717	33-0106028
Stephen Wallace, D.O.	Radiology	8933 Activity Rd	San Diego	CA	92126	A159116	33-0106028
Sydney Barnes	Speech Pathology	8701 Cuyamaca St	Santee	CA	92071	20A22802	33-0106028
David Chenoweth	Speech Pathology	1400 E Palomar St	Chula Vista	CA	91913	28809	33-0106028
Bailey Deschane	Speech Pathology	8933 Activity Rd	San Diego	CA	20027	11238	33-0106028
Anissa Govind	Speech Pathology	8933 Activity Rd	San Diego	CA	35372	20027	33-0106028
Alexandra Haynes	Speech Pathology	8933 Activity Rd	San Diego	CA	22250	35372	33-0106028
Cassie Lee	Speech Pathology	8933 Activity Rd	San Diego	CA	20418	22250	33-0106028
Abigail Oveis	Speech Pathology	8933 Activity Rd	San Diego	CA	30824	20418	33-0106028
Eva Perez	Speech Pathology	8933 Activity Rd	San Diego	CA	35409	30824	33-0106028
Sheri Smith	Speech Pathology	8701 Cuyamaca St	Santee	CA	9257	35409	33-0106028
Victoria Va	Speech Pathology	16899 W Bernardo Dr	San Diego	CA	18304	9257	33-0106028
Jordan Weber	Speech Pathology	8701 Cuyamaca St	Santee	CA	24400	18304	33-0106028
Mario Mancini, Lic. AC.	Acupuncture	3547 Camino Del Rio South	San Diego	CA	92108	AC5467	36-4521560
Kristy Baldwin	Audiology	10670 Wexford St	San Diego	CA	92131	2608	33-0106028
Meghan Cervantes	Audiology	2929 Health Center Dr	San Diego	CA	92123	3808	33-0106028
Karolina Crawford	Audiology	2929 Health Center Dr	San Diego	CA	92123	3213	33-0106028
Marin Dimmette-Schweigert	Audiology	2929 Health Center Dr	San Diego	CA	92123	3346	33-0106028
Natasha Fischang-Do	Audiology	2929 Health Center Dr	San Diego	CA	92123	2740	33-0106028
Jon Fraser	Audiology	10670 Wexford St	San Diego	CA	92123	AU3052	33-0106028
Francesca Maria Barton	Physical Therapy	7485 Mission Valley Rd #103	San Diego	CA	92108	19860	95-2666087
Kristine Flores	Physical Therapy	7485 Mission Valley Rd #103	San Diego	CA	92108	38221	95-2666087
Jirael Hipol	Physical Therapy	7485 Mission Valley Rd #103	San Diego	CA	92108	303014	95-2666087
Shane M Giblin	Physical Therapy	7485 Mission Valley Rd #103	San Diego	CA	92108	6171	95-2666087
Cami Walton-Thoeming	Physical Therapy	7485 Mission Valley Rd #103	San Diego	CA	92108	15750	95-2666087
Nancy Berard-Shuman	Occupational Therapy	7485 Mission Valley Rd #103	San Diego	CA	92108	3701	95-2666087

ATTACHMENT D

TO: City of San Diego (MPN FORM)

From: _____

Date: _____

	☐	ADD	Location
	☐	ADD	Provider
	☐	DELETE	Location
	☐	DELETE	Provider
Name			
	<i>first</i>	<i>middle initial</i>	<i>last</i>
Specialty			
Address		Medical License	
City		Billing Tax ID	
State, Zip		Change Date	
Doctor Type		Phone	

☐

ACCEPTED

☐

DENIED

Signature

Print Name / Date

RESOLUTION NUMBER R- 316759

DATE OF FINAL PASSAGE MAY 20 2026

A RESOLUTION OF THE COUNCIL OF THE CITY OF SAN DIEGO AUTHORIZING AGREEMENTS BETWEEN THE CITY OF SAN DIEGO AND SHARP REES STEALY MEDICAL GROUP, CONCENTRA MEDICAL CENTERS, AND KAISER PERMANENTE FOR THE PROVISION OF INDUSTRIAL MEDICINE SERVICES.

RECITALS

The Council of the City of San Diego (Council) adopts this Resolution based on the following:

- A. The City of San Diego (City) has a commitment to provide a safe working environment for its employees.
- B. When a City employee is injured, the employee's Workers' Compensation claim is processed by the Risk Management Department in accordance with the laws of the State of California for self-insured and self-administered agencies.
- C. To provide the best medical care available to its injured workers, and to comply with Workers' Compensation benefit mandates, and California Occupational Safety and Health Administration required testing, the City has established a medical provider network (MPN).
- D. The purpose of the MPN is to provide efficient industrial medicine services in a cost-effective manner.
- E. The structure of the City's MPN has been approved by the State of California.
- F. Currently, Sharp Rees Stealy Medical Group (SRSMG) and Concentra Medical Centers (Concentra) are the industrial medicine providers under the City's MPN.
- G. The City's contract with SRSMG expires on June 17, 2026, and the City's contract with Concentra expires on September 12, 2026.

H. The City recently issued a Request for Proposal (RFP) for industrial medical providers and SRSMG, Concentra, and Kaiser Permanente On-the Job (Kaiser) were the top candidates in the competitive RFP bid process.

I. To provide a robust medical panel and ensure the availability of specialty physicians, SRSMG, Concentra, and Kaiser were all selected to provide industrial medicine services and serve as the City's MPN.

J. The California Labor Code and California Code of Regulations allow for insurers and employers to create an MPN consisting of a variety of physicians where injured workers can be directed for treatment of industrial injuries.

K. The City has now completed the RFP process for new contracts for the provision of industrial medicine services and selected SRSMG, Concentra, and Kaiser have been selected for the award of new contracts for the provision of industrial medicine services and serve as the City's MPN.

L. The Office of the City Attorney prepared this Resolution based on the information provided by City staff, including information provided by affected third parties and verified by City staff, with the understanding that this information is complete and accurate.

ACTION ITEMS

Be it resolved by the Council of the City of San Diego:

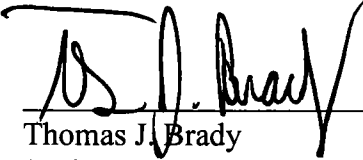
1. The City Council that the City Council authorizes and directs the Mayor or his designee to enter into a five-year contract with Sharp Rees-Stealy Medical Group in an amount not to exceed \$10,000,000.00 to provide industrial medicine services to City employees and serve as the City's Medical Provider Network. The contract is on file with the Office of the City Clerk as Document No. 316759-1

2. The City Council that the City Council authorizes and directs the Mayor or his designee to enter into a five-year contract with Concentra Medical Centers in an amount not to exceed \$8,750,000.00 to provide industrial medicine services to City employees and serve as the City's Medical Provider Network. The contract is on file with the Office of the City Clerk as Document No. 316759-2.

3. The City Council that the City Council authorizes and directs the Mayor or his designee to enter into a five-year contract with Kaiser Permanente On-the-Job in an amount not to exceed \$8,750,000.00 to provide industrial medicine services to City employees and serve as the City's Medical Provider Network. The contract is on file with the Office of the City Clerk as Document No. 316759-3.

4. The City Council authorizes the Chief Financial Officer to appropriate and expend from Workers' Compensation Fund 720044 up to \$27,500,000.00 for the five-year term of the contracts, contingent upon the adoption of the Annual Appropriations Ordinance for the applicable fiscal year and contingent upon the Chief Financial Officer first furnishing one or more certificates certifying that the funds necessary for expenditure are, or will be, on deposit with the City Treasurer.

APPROVED: HEATHER FERBERT, City Attorney

By 
Thomas J. Brady
Senior Deputy City Attorney

TJB:jvg
April 3, 2026
Or.Dept: Risk Management
Doc. No. 4384215

I certify that the Council of the City of San Diego adopted this Resolution at a meeting held on
MAY 12 2026.

DIANA J.S. FUENTES
City Clerk

By Connie Patterson
Deputy City Clerk

Approved: 5/20/26
(date)

Todd Gloria
TODD GLORIA, Mayor

Vetoed: _____
(date)

TODD GLORIA, Mayor

Passed by the Council of The City of San Diego on May 12, 2026, by the following vote:

Councilmembers	Yeas	Nays	Not Present	Recused
Joe LaCava	☒	☐	☐	☐
Jennifer Campbell	☒	☐	☐	☐
Stephen Whitburn	☒	☐	☐	☐
Henry L. Foster III	☒	☐	☐	☐
Marni von Wilpert	☒	☐	☐	☐
Kent Lee	☒	☐	☐	☐
Raul A. Campillo	☐	☐	☒	☐
Vivian Moreno	☒	☐	☐	☐
Sean Elo-Rivera	☒	☐	☐	☐

Date of final passage MAY 20 2026.

(Please note: When a resolution is approved by the Mayor, the date of final passage is the date the approved resolution was returned to the Office of the City Clerk.)

AUTHENTICATED BY:

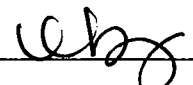
TODD GLORIA

Mayor of The City of San Diego, California.

(Seal)

DIANA J.S. FUENTES

City Clerk of The City of San Diego, California.

By , Deputy

Office of the City Clerk, San Diego, California

Resolution Number **R-316759**

Passed by the Council of The City of San Diego on **May 12, 2026**, by the following vote:

YEAS: **LACAVA, CAMPBELL, WHITBURN, FOSTER III, VON WILPERT, LEE, MORENO, ELO-RIVERA.**

NAYS: **NONE.**

NOT PRESENT: **CAMPILLO.**

RECUSED: **NONE.**

AUTHENTICATED BY:

TODD GLORIA

Mayor of The City of San Diego, California

DIANA J.S. FUENTES

City Clerk of The City of San Diego, California

I HEREBY CERTIFY that the above and foregoing is a full, true, and correct copy of the Resolution, and document(s) approved in connection therewith, as duly adopted by RESOLUTION NO. **R-316759** approved on **May 12, 2026**. The date of final passage is **May 20, 2026**.



DIANA J.S. FUENTES

City Clerk of The City of San Diego, California

By: Constance Patterson, Deputy