



# County of Monterey

Board of Supervisors  
Chambers  
168 W. Alisal St., 1st Floor  
Salinas, CA 93901

## Board Report

---

**File #:** A 18-244, **Version:** 1

---

Approve and authorize the Director of Health or the Assistant Director of Health to sign Amendment No. 2 to Agreement A-12704 with Panoramic Software Inc. for continued monthly maintenance services for the PG-ProWeb software program designed specifically for the Public Guardian for compliance with the Probate Code, adding \$58,000, for a revised total contract amount of \$286,000, and extending the agreement by one year for a revised term of July 1, 2014 through June 30, 2019.

### RECOMMENDATION:

It is recommended that the Board of Supervisors:

Approve and authorize the Director of Health or the Assistant Director of Health to sign Amendment No. 2 to Agreement A-12704 with Panoramic Software Inc. for continued monthly maintenance services for the PG-ProWeb software program designed specifically for the Public Guardian for compliance with the Probate Code, adding \$58,000, for a revised total contract amount of \$286,000, and extending the agreement by one year for a revised term of July 1, 2014 through June 30, 2019.

### SUMMARY/DISCUSSION:

On June 24, 2014, the Monterey County Board of Supervisors approved a three-year agreement between the Monterey County Department of Health's Public Guardian/Administrator/Conservator's Bureau (Public Guardian) and Panoramic Software Inc. The contract amount under this agreement was \$58,000 per Fiscal Year for a total contract of \$174,000. The term of the contract was from July 1, 2014 and expired on June 30, 2017.

On June 27, 2017, the Monterey County Board of Supervisors approved Amendment 1 to the agreement between the Monterey County Department of Health's Public Guardian/Administrator/Conservator Bureau (Public Guardian) and Panoramic Software Inc. to increase the agreement from \$174,000 to \$228,000 and extend the term of the contract from June 30, 2017 to June 30, 2018.

The services provided under this agreement include the monthly maintenance of the PG-ProWeb program. This is a web-based program that allows for tracking of cash and non-cash client assets, and provides tools to produce a variety of financial reports, as well as Probate Court Accounting forms required to be submitted to the Superior Court on an annual or bi-annual basis. The system allows authorized users to access information instantaneously from their office computer or laptop and provides real-time financial, medical and placement information on clients. The system also allows reports to be run and exported in predetermined formats such as Excel, Comma Separated Values (CSV), and Portable Document Format (PDF). Additionally, the system also assists in tracking Targeted Case Management (TCM) visitations for reimbursement by the State of California. The system also tracks events used for billing Public Guardian hours to specific cases for reimbursement from the client's estate, assists in the calculation and payment of monthly fees, and tracks the collection of Court ordered fee awards to the Public Guardian for probate matters.

The request to amend this agreement an additional Fiscal Year is to ensure the Public Guardian continues to provide reports to the Superior Court as required by law, allow users to access client's financial, medical and placement data, assist tracking TCM visits, billing time records, calculate and collect monthly fees, and track the collection of Court ordered fees awards for the Public Guardian.

While this work is not directly in support of a Health Department strategic initiative, it is in support of one or more of the ten essential public health services, specifically: 1) Monitor health status to identify and solve community health problems and, 7) Link people to needed personal health services and assure the provision of health care when otherwise unavailable.

OTHER AGENCY INVOLVEMENT:

Office of the County Counsel-Risk Management and the Auditor-Controller have reviewed and approved this Agreement as to legal form, liability and fiscal provisions respectively.

FINANCING:

Funding for the amendment to this agreement was included in Public Guardian's (4000-HEA008-8118) Fiscal Year 2018-19 Requested Budget. There are sufficient funds to cover the requested increase.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

Check the related Board of Supervisors Strategic Initiatives:

Economic Development:

- Through collaboration, strengthen economic development to ensure a diversified and healthy economy.

Administration:

- Promote an organization that practices efficient and effective resource management and is recognized for responsiveness, strong customer orientation, accountability and transparency.

Health & Human Services:

- Improve health and quality of life through County supported policies, programs, and services; promoting access to equitable opportunities for healthy choices and healthy environments in collaboration with communities.

Infrastructure:

- Plan and develop a sustainable, physical infrastructure that improves the quality of life for County residents and supports economic development results.

Public Safety:

- Create a safe environment for people to achieve their potential, leading businesses and communities to thrive and grow by reducing violent crimes as well as crimes in general.

Prepared by: Fabricio Chombo, Finance Manager I, x6343

Approved by: Ezequiel Vega, Assistant Director of Health, x4622

Attachments:

Panoramic Amendment No 2 is on file at the Clerk of the Board

Panoramic Amendment No 1 is on file at the Clerk of the Board

Panoramic Agreement is on file at the Clerk of the Board