



County of Monterey

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

Board Report

File #: A 14-111, **Version:** 1

Approve and authorize the Director of Health to enter into an Agreement with Panoramic Software, Inc. for three years of continued monthly maintenance service for the PG -ProWeb program, a system designed specifically for the Public Guardian to track client finances and provide basic reporting functions and daily Automated Clearing House (ACH) postings for a term of July 01, 2014 through June 30, 2017. Contract amount is \$58,000 per Fiscal Year for a total contract amount of \$174,000.

RECOMMENDATION:

It is recommended that the Board of Supervisors:

Approve and authorize the Director of Health to enter into an Agreement with Panoramic Software, Inc. for three years of continued monthly maintenance service for the PG -ProWeb program, a system designed specifically for the Public Guardian to track client finances and provide basic reporting functions and daily Automated Clearing House (ACH) postings for a term of July 01, 2014 through June 30, 2017. Contract amount is \$58,000 per Fiscal Year for a total contract amount of \$174,000.

SUMMARY/DISCUSSION:

Approve and authorize the Director of Health to enter into an Agreement with Panoramic Software, Inc. for three years of continued monthly maintenance service for the PG-ProWeb program, a system designed specifically for the Public Guardian to track client finances and provide basic reporting functions and daily Automated Clearing House (ACH) postings for a term of July 01, 2014 through June 30, 2017. Contract amount is \$58,000 per Fiscal Year for a total contract amount of \$174,000.

The Public Guardian's office installed the PG-ProWeb system in June 2012. It is a Web-Based program that allows for tracking of cash and non-cash client assets and provides tools to produce basic reports as well as Judicial Counsel forms for summarized accountings of client finances submitted to Superior Court on an annual or bi-annual basis. The system allows authorized users to access information instantaneously from their office computer or laptop in the field and provides them with "real-time" financial, medical, and placement information on each client. Reports can be run and exported in a range of pre-determined format including Excel, CSV, and PDF. The system also assists in tracking Targeted Case Management visitations for reimbursement by the State of California and automatically calculates monthly fees, both of which are critical to the revenue stream of the Public Guardian's office.

While this Board action is not directly in support of a Health Department strategic initiative, it is in support of one or more of the 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 available.

OTHER AGENCY INVOLVEMENT:

County Counsel has reviewed the Agreement as to legal form. A copy of the Agreement and Exhibit A - Software Maintenance will be on file with the Clerk to the Board.

FINANCING:

The cost of this contract is included in the proposed Fiscal Year 2014-15 Public Guardian, 001-4000-HEA008 budget.

Prepared by: Deanna Gunn, Finance Manager, 7555

Approved by: Ray Bullick, Director of Health, 4526

Attachments:

Professional Services Agreement

Exhibit A - Software Maintenance Agreement