



# County of Monterey

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

## Board Report

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**File #: A 17-263, Version: 1**

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Approve and Authorize the Director of Health or the Assistant Director of Health to sign Amendment No. 1 to Agreement No. A-12704 with Panoramic Software Inc., adding one (1) additional year of continued monthly maintenance services for the PG-ProWeb program designed specifically for the Public Guardian and increasing the Agreement amount by \$54,000, for a new total Agreement amount of \$228,000, for the revised period July 1, 2014 through June 30, 2018.

### 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. 1 to Agreement No. A-12704 with Panoramic Software Inc., adding one (1) additional year of continued monthly maintenance services for the PG-ProWeb program designed specifically for the Public Guardian and increasing the Agreement amount by \$54,000, for a new total Agreement amount of \$228,000, for the revised period July 1, 2014 through June 30, 2018.

### 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 \$54,000 per Fiscal Year for monthly services and an additional \$4,000 per year for training or other maintenance, for a total Agreement of \$174,000. The term of the contract was from July 1, 2014 and expires on June 30, 2017.

The services provided under this Amendment No. 1 will 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 basic reports as well as Judicial Counsel forms for summarized accountings of client finances submitted to the Superior Court on an annual, bi-annual, or quarterly 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 and assists in the calculation of monthly fees.

The request to amend this Agreement one (1) additional Fiscal Year will ensure Public Guardian continues to provide reports to the Superior Court, allow users to access client's financial, medical and placement data, and assist the tracking of TCM visitations and calculation of monthly fees.

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:**

County Counsel, Auditor-Controller, and Risk Management have reviewed and approved this Agreement as to legal form, fiscal provisions, and insurance requirements, respectively.

**FINANCING:**

There are sufficient appropriations in the Health Department Public Guardian Bureau's (001-8118-HEA008), FY 2017-18 Requested Budget to cover services.

**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, 6343

Approved by: Elsa Jimenez, Director of Health, 4526

Attachments:

Amendment 1 is on file with the Clerk of the Board

Agreement is on file with the Clerk of the Board