



# County of Monterey

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

## Board Report

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**File #: A 19-121, Version: 1**

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Approve and authorize the Director of Health or the Assistant Director of Health to sign Amendment No. 3 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 to track client finances and basic reporting, adding \$58,000, for a revised total Agreement amount of \$344,000 and extending the term by one year to June 30, 2020.

**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. 3 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 to track client finances and basic reporting, adding \$58,000, for a revised total Agreement amount of \$344,000 and extending the term by one year to June 30, 2020.

**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 No. 1 to the Agreement between the Public Guardian and Panoramic Software Inc. to increase the Agreement from \$174,000 to \$228,000 and extend the term of the contract from July 1, 2017 to June 30, 2018.

On June 12, 2018 the Monterey County Board of Supervisors approved Amendment No. 2 to the Agreement between the Public Guardian and Panoramic Software Inc. to increase the Agreement from \$228,000 to \$286,000 and extend the term of the contract from July 1, 2018 to June 30, 2019.

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 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 an additional Fiscal Year is to ensure the Public Guardian continues to provide reports to the Superior Court, allow users to access client's financial, medical and placement data, and calculation of monthly fees while the Public Guardian continues to work with vendor to enhance software functions. In the event Public Guardian and vendor are not able to enhance software performance, Public

Guardian will explore other options.

This work supports the Monterey County Health Department 2018-2022 Strategic Plan initiative, 4. Engage MCHD workforce and improve operational functions to meet current and developing population health needs. It also supports the following of the ten essential public health services, specifically: 7. Link people to needed personal health services and assure the provision of health care when otherwise unavailable.

OTHER AGENCY INVOLVEMENT:

County Counsel and the Auditor-Controller have reviewed and approved this Agreement as to legal form and fiscal provisions respectively.

FINANCING:

Funding for the Amendment to this Agreement was included in Public Guardian's (4000-HEA008-8118) Fiscal Year 2019-20 Requested Budget and 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:

Amendment No. 3 to Panoramic Software Agreement is on file with the Clerk of the Board

Amendment No. 2 to Panoramic Software Agreement is on file with the Clerk of the Board

Amendment No. 1 to Panoramic Software Agreement is on file with the Clerk of the Board

Panoramic Software Agreement No. A-12704 is on file with the Clerk of the Board