



County of Monterey

Item No.

Board Report

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

Legistar File Number: A 26-085

April 14, 2026

Introduced: 3/13/2026

Current Status: Agenda Ready

Version: 1

Matter Type: BoS Agreement

- a. Approve and authorize the Director of Health Services or designee to execute Amendment No. 3 to Agreement No. A-14688 with Panoramic Software Corporation, for the provision of web based software subscription, database hosting, technical support/maintenance of the ProWeb Solution utilized by the County of Monterey Health Department's Public Guardian Bureau, extending the term by an additional three years for a new term of July 1, 2020 through June 30, 2029 adding \$191,860 for a new total agreement amount of \$548,360; and
- b. Approve and authorize the Director of Health Services or designee to approve one future Amendment that does not exceed 10% (\$16,950) of the original Agreement amount, does not significantly alter the scope of services, and does not exceed the maximum amount of \$565,310.

RECOMMENDATION:

It is recommended that the County of Monterey Board of Supervisors:

- a. Approve and authorize the Director of Health Services or designee to execute Amendment No. 3 to Agreement No. A-14688 with Panoramic Software Corporation, for the provision of web based software subscription, database hosting, technical support/maintenance of the ProWeb Solution utilized by the County of Monterey Health Department's Public Guardian Bureau, extending the term by an additional three years for a new term of July 1, 2020 through June 30, 2029 adding \$191,860 for a new total agreement amount of \$548,360; and
- b. Approve and authorize the Director of Health Services or designee to approve one future Amendment that does not exceed 10% (\$16,950) of the original Agreement amount, does not significantly alter the scope of services, and does not exceed the maximum amount of \$565,310.

SUMMARY:

The County of Monterey Health Department's Public Guardian/Administrator/Conservator Bureau operates under the authority of the California Probate Code and court appointment to provide fiduciary and case management services for conserved individuals. These services include individual assessments, fiscal management, housing coordination, establishment and eligibility of government and private benefits, care coordination, targeted case management visitations, and overall client support.

To track fiduciary and case management services, Public Guardian staff utilize the ProWeb Solution software developed by Panoramic Software Corporation. Approval of this Amendment No. 3 will ensure continuity of service tracking, completion of reporting updates, maintenance of the existing software platform, and compliance with reporting requirements to the Superior Court of California, County of Monterey, as well as State and Federal agencies.

DISCUSSION:

The recommended amendment is necessary to maintain uninterrupted access to the ProWeb Solution system, which supports the Public Guardian’s fiduciary responsibilities and case management documentation. Continued access ensures accurate financial tracking, service documentation, and compliance with court-mandated and regulatory reporting standards.

Without this Amendment No. 3, the Public Guardian Bureau would risk gaps in data access, reporting delays, and potential non-compliance with court and governmental requirements. The system supports transparency, accountability, and effective oversight of conservatorship cases, safeguarding the financial and personal well-being of vulnerable clients served by the County.

OTHER AGENCY INVOLVEMENT:

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

FINANCING:

Appropriations for this agreement are included in the Health Department’s FY 2025-26 Adopted Budget for Public Guardian Bureau (4000-HEA008-8118). For the FYs out, provisions will be made in the Requested Budget for the appropriate year.

BOARD OF SUPERVISORS STRATEGIC INITIATIVES:

This recommendation advances the Board’s goal of Well-Being and Quality of Life by ensuring continued oversight, accountability, and coordinated support services for vulnerable conserved individuals. It supports Key Objectives related to protecting at-risk populations and strengthening systems that promote health, safety, and stability through effective case management and fiduciary oversight.

Mark a check next to the related Board of Supervisors Strategic Plan Goals:

- Well-Being and Quality of Life
- Sustainable Infrastructure for the Present and Future
- Safe and Resilient Communities
- Diverse and Thriving Economy

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Approved by: Elsa Mendoza Jimenez, Director of Health Services, 755-4526

Attachments:

- Board Report
- Amendment No. 3
- Amendment No. 2
- Board Order(Amd. No.2)
- Amendment No. 1
- Board Order (Amd. No. 1)
- Agreement

