

# COUNTY OF EL DORADO

## HEALTH & HUMAN SERVICES

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## AGENCY DIVISIONS

Administration & Finance  
Behavioral Health  
Community Services  
Protective Services  
Public Health  
Self-Sufficiency

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DATE: October 16, 2023

TO: Honorable Board of Supervisors  
Tiffany Schmid, Chief Administrative Officer

FROM: Olivia Byron-Cooper, Director of Health & Human Services *OBC*

SUBJECT: Retroactive Renewal of Agreement for Services – Item 23-1753, 11/14/23  
Panoramic Software Corporation (Panosoft) 8111

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This memo is to notify you that a retroactive contract request has been created and is on the Board of Supervisor's Agenda for November 14, 2023 (File ID: 23-1753).

Since 2012, HHSA staff assigned to the Public Guardian Office and Self-Sufficiency GA Program have utilized the Panoramic PG-Pro Web case management software provided by Panosoft to create, track, and manage data pertaining to program participation and performance. The Panoramic PG-Pro Web software supports various aspects of the Public Guardian Office's program operations, including documentation for investigations, case management, and tracking payments, receipts, and bank reconciliations for clients. This comprehensive case-management software includes features such as: storage of client's case notes, client addresses, and appointment history; and pre-filled form letters, all of which are utilized by both the Public Guardian Office and GA Program. Additionally, the software allows images to be attached to client files and allows staff to generate court-related documents and agency-wide reports.

There was an oversight between programs about who administers the contract, resulting in no action to renew. Staff are working to build in safeguards to prevent similar issues from occurring in the future. Staff are designating the General Assistance program as the contract administrator in FENIX going forward which clearly defines responsibility for oversight.

Panosoft did not remove access to Panoramic PG-Pro Web software. In order for Panosoft to bill for the services it provided during that time, HHSA requests the Board approve the term of the purchase contract retroactive to July 1, 2023.

As always, please let me know if you have any questions or would like to discuss anything further.