



## Legislation Text

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**File #:** 20-0712, **Version:** 1

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Health and Human Services Agency recommending the Board:

- 1) Approve and authorize the Chair to sign Agreement for Services 4860 with Panoramic Software Corporation, for the provision of proprietary client data management software for the Public Guardian and General Assistance programs, for the term July 1, 2020 through June 30, 2023, with a maximum contractual obligation of \$100,000; and
- 2) Authorize the Purchasing Agent, or designee, to execute further documents relating to Agreement for Services 4860, including amendments that do not increase the allowable annual rate increase or change the term of the Agreement, and contingent upon approval by County Counsel and Risk Management.

**FUNDING:** The Public Guardian and General Assistance programs are a County General Fund obligation.

**DISCUSSION / BACKGROUND:**

Panoramic PGPro Web is a software program that supports Public Guardian Program's management of documentation for investigations, case management, payments, and receipts, along with bank reconciliations for clients. In addition, images can be attached to files, and court accounting documents can be produced. The software has the capability to produce agency wide reports as well as court documentation.

The case-management function stores case notes, address history, appointment history, and has pre-filled form letters, and is used by both the Public Guardian and General Assistance programs, particularly for case management.

Contractor provides telephone support Monday through Friday, excluding holidays. The Agreement includes system updates to PG-Pro Web to fix application software errors and/or improve security. Such updates may include changes necessary to meet federal, state, and county mandated requirements. If needed, custom programming can be provided.

Health and Human Services Agency's Public Guardian and General Assistance Programs began using Contractor's software in June 2014 for client case management and have successfully used the product since that time.

Pursuant to Board of Supervisors Resolution 142-2001, proprietary software is exempt from competitive bidding. HHS worked with County of El Dorado's Information Technologies Department to ensure the software and the contract meet Agency requirements.

**ALTERNATIVES:**

Should the Board decline to approve this Agreement, the Programs will need to find another software company who can provide a full array of case management software similar to that provided by Panoramic, thereby creating a lapse in available software to support the Public Guardian and General Assistance programs.

**PRIOR BOARD ACTION:**

- 1) 05-19-2015, File ID 15-0554, HHSA Panoramic AGMT
- 2) 06-10-2014, File ID 12-0576, version 2, HHSA/Health and Human Services Agency Panoramic Amd
- 3) 05-22-2012, File ID 12-0576, version 1, Panoramic Agmt 514-S1211

**OTHER DEPARTMENT / AGENCY INVOLVEMENT:**

Approved by County Counsel, Human Resources, and Risk Management.

**CAO RECOMMENDATION:**

It is recommended that the Board approve this item.

**FINANCIAL IMPACT:**

The Net County Cost for the license fee is \$27,000 per year. Sufficient appropriations are included in the Fiscal Year 2020-2021 Recommended Budget and will be included in future budgets for the term of the Agreement. Should additional services (e.g., programming, training, etc.) be needed during the term of the Agreement, they will be paid by either: 1) realized budget savings; or 2) a budget transfer request will be submitted if there are insufficient budget savings.

**CLERK OF THE BOARD FOLLOW UP ACTIONS**

- 1) Clerk of the Board to obtain the Chair's signature on two (2) originals of Agreement for Services 4860.
- 2) Clerk of the Board to return one (1) fully executed Agreement to Health and Human Services Agency, Contracts Unit.

**STRATEGIC PLAN COMPONENT:**

N/A

**CONTACT**

Don Semon, Health and Human Services Agency Director