

**MEMORANDUM  
COUNTY OF PLACER  
DEPARTMENT OF ADMINISTRATIVE SERVICES  
PROCUREMENT SERVICES DIVISION**

TO: Honorable Board of Supervisors  
FROM: Brett Wood, Purchasing Manager  
DATE: February 3, 2015  
SUBJECT: Software System for Adult Protective Services & Public Guardian – Panoramic Software

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**ACTION REQUESTED**

1. Approve the award of a purchase order to Panoramic Software Inc. of Greenbrae, CA, for the purchase and implementation of hosted software services in the total amount of \$150,000 funded by the Health & Human Services FY 2014-15 budget with no new net County cost,
2. Authorize the renewal of the hosted services in an amount not to exceed \$72,000 annually for two additional years following the implementation,
3. Authorize the Purchasing Manager to sign the resulting purchase orders, and
4. Approve a budget revision to the Adult System of Care appropriation in the amount of \$150,000, funded by increased Federal Social Services revenue.

**BACKGROUND**

Health & Human Services Department (HHS) is responsible for the Public Guardian, Public Administrator and Adult Protective Services Programs. HHS has been using an antiquated DOS based system to manage Public Guardian (PG) program client fiduciary and other administrative responsibilities. This system must be replaced due to functional deficiencies and is included in the County's IT Strategic Plan adopted by your board in November 2011. The vendor, Computrust, has an upgrade version of this old system that has been reviewed by HHS Fiscal and Program staff who has determined that Computrust's new system will not meet current functional and State reporting requirements.

The Public Administrator (PA) is without a software system and is providing fiscal reconciliation of estates without the benefit of a software system.

Additionally, Adult Protective Services (APS) has been using a customized version of Avatar, an electronic medical records management system, to administer client intake and to maintain client history. Avatar is not designed to meet specific APS client administration or State reporting requirements, and would most likely not meet future state reporting requirements.

The Placer County Health & Human Services Department (HHS) submitted a request to purchase software that would assist that department with the management of data for statewide reporting requirements. Purchasing Policy Manual (PPM) Section 1.3e allows for the purchase of goods or services from a vendor based on another government entity's cooperative contract. Panoramic Software currently has contracts with other local CA government agencies that meet this requirement.

APSPRO, PGPRO and PAPER, a suite of products from Panoramic Software, Inc., are designed specifically as APS, PG and PA client management and reporting systems. HHS Fiscal and Program staff has evaluated multiple demonstration versions of these and other vendor's products, and they have determined that these three Panormic products best meet their current client administration and State

reporting requirements. Panoramic has committed to updating their reporting functionality to keep current with State requirements.

HHS and County Information Technology staff have reviewed a proposal, demonstration and "hands-on" experience of the software from Panoramic and are confident that this system will deliver improved client administration and reporting capabilities, help to ensure compliance with state requirements, and improve their operations with respect to APS, PG and PA services.

The system is fully maintained and hosted by Panoramic. Utilizing a hosted services approach will ensure that the resulting system is maintained in compliance with the state requirements without the need for additional county IT resources. This model means that the County pays a monthly fee to utilize the software and does not own or maintain it independently.

Therefore your Board's approval is required to execute purchase orders with Panoramic Software for the implementation and hosted services in the amount of \$150,000.

### **FISCAL IMPACT**

The purchase orders resulting from this recommendation will total \$150,000. With the approved technical budget revision the department confirmed that this purchase will be funded within the department's FY 2014-15 budget fund with no new net County cost as a result of unspent dollars in the current year. The hosting and maintenance cost will be included in FY 2015-16 requested budget and future years as required.

cc: Maureen Bauman, Director Adult System of Care  
Kathy Buchanan, Deputy Director of Information Technology Services

PLACER COUNTY

PAS DOCUMENT NO.

**BUDGET REVISION**

**POST DATE:**

DEPT NO.	DOC TYPE	Total \$ Amount	TOTAL LINES
14	BR	300,000.00	2

Cash Transfer Required

Reserve Cancellation Required

Establish Reserve Required

1/21/15

Auditor-Controller

County Executive

Board of Supervisors

ESTIMATED REVENUE ADJUSTMENT										APPROPRIATION ADJUSTMENT											
DEPT NO.	T/C	Rev	Fund	Sub Fund	OCA	PCA	OBJ 3	PROJ.	PROJ. DTL	AMOUNT	DEPT NO.	T/C	Rev	Fund	Sub Fund	OCA	PCA	OBJ 3	PROJ.	PROJ. DTL	AMOUNT
14	006				994293	94293	7419			150,000.00	14	014				994293	94293	2838			150,000.00
<b>TOTAL</b>										150,000.00	<b>TOTAL</b>										150,000.00

REASON FOR REVISION: To increase Appropriation expenses for software project. To increase Federal Social Services revenue for FY 2014-15 that is unbudgeted at this point.

Prepared by Jim Nissen Ext 3143

Department Head *[Signature]*

Board of Supervisors \_\_\_\_\_

Date: 1/21/15

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Budget Revision # \_\_\_\_\_ FOR INDIVIDUAL DEPT USE

2015 JAN 21 PM 12:38  
 AUDITOR-CONTROLLER

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**Placer County  
Health and Human Services Department**

**Administrative Services Division**

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Date: January 21, 2015  
To: Honorable Board of Supervisors  
From: Rebecca Mellott, Director of HHS Administrative Services  
Subject: **Fiscal Impact Statement  
Adult System of Care  
Panoramic Software, Inc. – PO for software services  
For the period February 1, 2015 to June 30, 2015**

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The Department has prepared a budget revision to the approved FY2015-16 Final Budget for this \$150,000 Purchase Order (PO). It is funded with federal revenue and does not require additional County General Fund. The services will provide administration and reporting capabilities for clients in the Adult Protective Services, Public Administrator, and Public Guardian programs.

*Perspective, Hope, and Opportunity*