



# COLLIN COUNTY

Office of the Purchasing Agent  
2300 Bloomdale Road  
Suite 3160  
McKinney, Texas 75071  
[www.collincountytx.gov](http://www.collincountytx.gov)

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## ADDENDUM No. Three (3)

### Jury Management System RFP No. 2013-179

Effective: June 21, 2013

You are hereby directed to make changes to the Request for Proposal in accordance with the attached information:

**Delete: Attachment A-Business Requirements**

**Replace with: Revised Attachment A-Business Requirements (Deleted Section 15 & 16-Changes made in red)**

**Clarification: The County is asking for IVR system that can interface with our current IVR system.**

**Extended Question & Answer date: Scheduled to end Tuesday June 25, 2013 at 5:00p.m.**

Please note all other terms, conditions, specifications drawings, etc. Remain unchanged.

Sincerely,  
Michalyn Rains CPPO, CPPB  
Purchasing Agent

**Functional Category: Jury Management System**

**Responses:**

**F** = Fully Provided "Out-of-the-Box"

**R** = Provided with Reporting Tool

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| Reference Number | Functional Requirements   | Response | Module Required to Fulfill Requirements | Assumptions/Comments |
|------------------|---|----------|---|----------------------|
| 1.00             | <b>JURY MANAGEMENT SYSTEM REQUIREMENTS</b>  |          |   |                      |
| 1.01             | Track the juror from the time of summons through completion of their jury service.  |          |   |                      |
| 1.02             | Allow the courts to request their jury panels directly through the jury service calendars.  |          |   |                      |
| 1.03             | Provide on-line help, prompts, and documentation to assist system users and administrators.   |          |   |                      |
| 1.04             | Accept and process juror source lists in the format provided by the Texas Secretary of State.   |          |   |                      |
| 1.05             | Process groups of jurors.   |          |   |                      |
| 1.06             | Process both general and trial specific questionnaires.   |          |   |                      |
| 1.07             | Produce summons both for general jury call and direct summons to a specific court.  |          |   |                      |
| 1.08             | Maintain and display juror information and histories consistent with the requirements of the Chapter 62 of the Texas Government Code. |          |   |                      |
| 1.09             | Process and manage pre-service jurors.  |          |   |                      |

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| 1.10             | Provide the ability to scan a driver's license if the juror does not have their summons for check-in.   |          |   |                      |
| 1.11             | Record in-service jurors.   |          |   |                      |
| 1.12             | Record basic case information and form jury panels and shuffles when needed.  |          |   |                      |
| 1.13             | Compute and maintain juror costs.   |          |   |                      |
| 1.14             | Capture juror related statistics and produce jury management reports.   |          |   |                      |
| 1.15             | Produce notices including the ability to accommodate formats of outside letter vendors as well as the ability to print to local and networked printers in the County. |          |   |                      |
| 1.16             | Manage system/court and juror user security.  |          |   |                      |
| 1.17             | Provide automatic customizable payroll processing and reporting, including IRS Form 1099 reporting.   |          |   |                      |
| 1.18             | Interface with external systems such as Collin County Elections and Auditor's Offices and the Texas Secretary of State.   |          |   |                      |
| 1.19             | Ability to accommodate browser-based functionalities that are operating system independent.   |          |   |                      |

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| 1.20             | Provide data conversion from Collin County's existing system, including a full and/or partial load in from an external database, as determined by the County. |          |   |                      |
| 1.21             | Provide the County with system administration capabilities.   |          |   |                      |
| 1.22             | Customization capability in areas such as front-end, web-based platforms and other system development capabilities.   |          |   |                      |
| 1.23             | Capability to notify jurors by use of mobile devices for contact.   |          |   |                      |
|                  |   |          |   |                      |
| <b>2.00</b>      | <b>JURY SUMMONS-POST SUMMONS FUNCTIONALITIES</b>  |          |   |                      |
| 2.01             | Support a one-step summons/questionnaire mail-out.  |          |   |                      |

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| 2.02             | Assign a unique number to identify each record housed in the Jury Wheel and used throughout the system. This number is referred to as the Juror ID Number. The system shall also provide the ability to search for individual records by the Juror ID Number, juror name or another juror reference, such as Texas Driver License number or birth date. This number shall not be a duplicate of previous Juror ID numbers |          |   |                      |

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| 2.03             | Randomly select potential jurors for summoning individually or in Court user-defined groups from the Jury Wheel and provide an automated interface to produce exportable summons files for a bulk mail processor, as well as the ability to print in house to network printers or Adobe PDF files. This process shall include the ability to select potential jurors automatically from specified zip areas. The fields to be included in this file and their placement order shall be setup to provide interface with the County's bulk mailing processes. The proposed system shall allow staff to manually add any individual record in |          |   |                      |
| 2.04             | Filtering of names and addresses using the National Change of Address (NCOA) filtering services and death verification database(s), and the U.S. Postal approved Address Correction Services. Address changes shall be downloaded  |          |   |                      |
| 2.05             | Ability to pre-sort address files, to ensure that mail is sorted in manner in which to obtain the lowest possible First Class (1 <sup>st</sup> ) postal rate.  |          |   |                      |

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| 2.06             | Ability to provide export files (.txt, .xml, .csv, Excel, Word,.pdf and/or Access database).   |          |   |                      |
| 2.07             | recording information from the returned juror questionnaires. This information includes, but will not be limited to, hand printed address, occupation information, telephone numbers and check-box information. The Contractor will assist the County or Court in developing the questionnaire forms and will develop the system to incorporate the information into the juror database. |          |   |                      |
| 2.08             | availability from their responses to their questionnaires regarding any disqualifications, exemptions, and biographical and demographic information that is relevant to service of a juror.  |          |   |                      |

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| 2.09             | Ability for a user to review and change a summoned juror record. Where the participant is to be excused, disqualified, or postponed, the user shall be able to specify a reason for the excuse, disqualification, or postponement. The reason, date, time and authorized user who granted the excuse, disqualification, or postponement shall be automatically |          |   |                      |

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| 2.10             | Include functions for excusing, disqualifying and postponing service of a juror. In the case of a jury service postponement, the user shall be able to select a date from available dates within defined a range (i.e. from the next available day of service not to exceed six months). This function shall be integrated with the IVR/IWR Systems. All juror transactions that involve excusing, disqualifying, postponing or re-summonsing will allow the user the option to automatically generate a confirmation notice to the prospective juror by selecting a method of notification (e.g. telephone, email, text messaging, or postcard). The system shall have the ability to create download files used to generate mailed |          |   |                      |

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| 2.11             | means and parameters of handling no response and failure to appear (FTA) records to include generating notifications and/or deferring the record to a new date. The system shall automatically flag the juror's record if no response has been made to the summons prior to the report or call-in date or the juror fails to appear. The system shall track the number of no responses and FTAs for each juror |          |   |                      |
| 2.12             | Ensure that any juror who has postponed their jury services, at the time a new jury pool is created, are selected before additional prospective jurors are randomly selected from the Jury Wheel. Jurors postponed from one summons period to the next shall be automatically included in the output file for  |          |   |                      |
| 2.13             | Support a call-in procedure to allow staff to specify the number of reporting versus call-in jurors summoned on a given day. This function shall be integrated with the IVR/IWR Systems.   |          |   |                      |

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| 2.14             | Provide a mechanism to read the bar code on the juror affidavit questionnaire and jury summons and locate and update the prospective juror's record. In order to speed the Juror check-in process, the system shall take advantage of OCR or Bar Code capability to recognize the Juror number. |          |   |                      |
| 2.15             | scan a returned summons (address undeliverable) to update jury wheel records shall be provided. Bar codes shall be viewable without having to open the envelope (i.e. through the envelope window).   |          |   |                      |
| 2.16             | If a summons is returned claiming to be exempt or disqualified, the capability to scan for marked exemptions / disqualifications shall be provided.   |          |   |                      |
| 2.17             | Attendance reporting (summoned, undelivered, exempt, disqualified, rescheduled, reported, no-shows), at the detail and summary levels shall be supported. All reports shall be viewable online via the intranet, user definable,  |          |   |                      |

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| 2.18             | If a prospective juror requests a postponement via the web, the system shall support the sending of E-mail (MS Outlook) or text messaging reminders concerning upcoming service. All email or text communications with prospective jurors shall be documented in the JMS system. |          |   |                      |
| 2.19             | complete the Juror Questionnaire provided as part of the summons. The proposed system shall support gathering this information via mail web or phone response prior to the actual appearance for jury service.   |          |   |                      |

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| 2.20             | Maintain in the juror's record the juror's biographical and demographic information as required in Chapter 62 of the Texas and Government Code as well as status, court assignment, voir dire information, report date(s),postponements, juror ID number, telephone numbers (home, work, cell), email addresses, juror payments or donations, failure to appear, non-response, days served and additional items related to their service including next attendance date, call-in or report indicator, status, case number, regular or special pool indicator, check-in and check-out times, postponement dates, a free form notes entry scroll box, number of attendances, number of times |          |   |                      |
| 2.21             | the capability of collecting juror email addresses and also shall have the capability to purge the email addresses within specified time frames as outlined by the Texas Government Code Chapter 62.0111.  |          |   |                      |

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| 2.22             | Ability to allow users to develop and issue juror surveys and exit questionnaires.  |          |   |                      |
| 2.23             | Track and automatically record each step of the juror's service history beginning with summoning through payment. The history shall continue through his/her lifetime (or as allowed by the Texas Government Code, Chapter 62) and be accessible by the person's name, status, report date or juror ID number. The history shall also reflect if the person was disqualified, excused, or postponed and reason. All history documentation shall include the |          |   |                      |
| 2.24             | Ability to archive, reactivate and delete entire pools as well as maintain juror history.   |          |   |                      |
| 3.00             | <b>JUROR ATTENDANCE FUNCTIONALITIES</b>   |          |   |                      |

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| 3.01             | Provide for processing attendance information from scanned badges when a prospective juror arrives by posting date and time information in their attendance record. The proposed system shall also make provisions to ensure that the prospective jurors being scanned in are reporting on the date they are expected. If the arriving prospective juror is not expected on that date or in that location, the system shall allow the user to add the juror to the pool. The proposed system shall be able to accept information simultaneously from all users at a rate sufficient to record all |          |   |                      |
| 3.02             | Provide for printing a new bar code summons or badge form for a juror who fails to bring in their summons or badge.   |          |   |                      |
| 3.03             | panels of any size (up to 999) either by a process of random selection or by group (in the case of Grand Jury) and track the panel members to and from the courtroom.   |          |   |                      |

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| 3.04             | system shall provide the ability to list and graphically display the number of individuals and groups scheduled to appear, the number actually checked-in, the number currently checked out of the jury room, the number presently in courtrooms, the total number of prospective jurors currently available for selection on a voir dire panel and the total number of prospective jurors in the jury room that have not yet been                            |          |   |                      |
| 3.05             | Provide for displaying a list and total number of all potential jurors scheduled to appear or who are on-call for a given appearance day. From this list, staff shall be able to identify the number of jurors available to report. Additionally, the system shall allow individuals to be moved from on-call to reporting status and interface with the IVR/IWR systems to notify participants of his/her jury status by telephone, email or text messaging. |          |   |                      |
| 3.06             | Provide for reassigning a group or an individual to another court location.   |          |   |                      |

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| 3.07             | Provide for returning a juror to the pool or completing their service by scanning the juror ID on their bar-coded badge. The system shall allow staff to dismiss jurors by groups or individually from the pool to complete his/her service.   |          |   |                      |
| 3.08             | Identify jurors who have not responded to the questionnaires and provided functionality to automatically generate follow-up notices. The system shall allow time sequencing and escalation of failure to respond letters.  |          |   |                      |
| 3.09             | Provide for processing a juror who arrives on the wrong date or to the wrong court by reassigning the prospective juror to the current location and date or by reassigning the prospective juror to another future date. Similar functions shall be provided for excused or postponed jurors attempting to report or for jurors who did not return |          |   |                      |

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| 3.10             | Provide the ability to print a verification letter of jury attendance for the juror to provide to his/her employer or for his/her records. The capability shall also be provided for the juror to print on line. |          |   |                      |
| 3.11             | Provide for updating or correcting a person's name and address. This update shall be recorded in the juror's history record indicating previous name or address information.                                     |          |   |                      |
| 3.12             | The Juror's ID and Juror Name shall be printed on the badge, and a bar coded version of the Juror ID and Juror Name shall be printed on the badge as well.   |          |   |                      |
| 4.00             | <b>CASE MANAGEMENT FUNCTIONALITIES</b>   |          |   |                      |

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| 4.01             | during a designated time frame and the expected number of prospective jurors required. Specific data that is to be provided in the JMS system's case history shall include, case type, case number, description, number of report copies, charge type, Judge's name, courtroom, jurisdiction, start date, duration, cancel reason, jurors |          |   |                      |
| 4.02             | As the case proceeds, update the start and end dates and juror dispositions including seated, alternate, stipulated, peremptorily challenged (prosecution or defense, plaintiff or defendant), not reached and sworn.   |          |   |                      |
| 4.03             | the status of activities. (voir dire, panels presently in courtrooms, trial start and end dates)  |          |   |                      |
| 4.04             | Daily attendance of jurors assigned to a case.  |          |   |                      |
| 4.05             | jurors attending, number empanelled, date of sequestration, dates of deliberation, attributed to the case by day.   |          |   |                      |

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| 4.06             | suite of reports and data entry sheets for courtrooms to use during the jury selection process. The forms shall be viewable, accept online entries, be properly titled, and be printable. The initial panel reports shall include an alphabetical list (attorney's list), random list for selection (judge's list), voir dire list and seating plan and allow the user to check off attendance and status (juror, alternate juror, not reached, excused, peremptory, for cause, stipulated by party, etc.) for entry into the jury system. The seating plan shall be customizable to each court's seating layout (seats per row and rows shall be configurable) and provide for alternate jurors as well as for |          |   |                      |
| 4.07             | Allow prospective jurors who have not yet been sent to a courtroom to be sent first and prohibit returning jurors from being sent back to the same case.  |          |   |                      |

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| 4.08             | Ability to allow staff to redirect a juror or a panel to other cases, to return panels to the pool, to cancel a case/panel (with reason code) or to dismiss panels (complete his/her service). |          |   |                      |
| 4.09             | The proposed system will prevent jurors being assigned to panels at the same time.   |          |   |                      |
| 4.10             | Ability to send summons directly to the Justice of the Peace offices.  |          |   |                      |
| 4.11             | Allow the typing of capital letters in every field in the system.  |          |   |                      |
| 4.12             | Scan all jury questionnaires (two sided) returned by prospective jurors as an image document.  |          |   |                      |
| 4.13             | Allow for the changing or wording on optical mark recognition questionnaires as needed.  |          |   |                      |
| 4.14             | Provide the ability to print a summons without having to use the entire questionnaire/summons form in cases where the juror reschedules.   |          |   |                      |
| 5.00             | <b>JURY SERVICE CALENDAR</b>   |          |   |                      |

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| 5.01             | Allow a user to create the jury calendar — allowing them to schedule normal jury service days and block out non-jury days (e.g. holidays, non-jury weeks, etc.). |          |   |                      |
| 5.02             | The calendar shall be available in report form so that it can be e-mailed to the various courts or available for display on the webpage.                         |          |   |                      |
| 5.03             | The calendar function shall support the differing schedules of multiple jury locations.  |          |   |                      |
| 5.04             | The calendar will play an integral part in allowing postponements to be accepted via phone and website. It shall integrate or use MS Outlook calendar features.  |          |   |                      |
| 5.05             | The proposed software shall have the capability for the courts to request their jury panels directly through the jury service calendars.                         |          |   |                      |
| <b>6.00</b>      | <b>JUROR ROOM PROCESSING</b>   |          |   |                      |
| 6.01             | The system shall support automated juror check-in. Wireless scan gun or tablets devices shall ease the check-in process.   |          |   |                      |

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| 6.02             | Ability to scan the questionnaires and store them by juror ID, name, or seating order.   |          |   |                      |
| 6.03             | OCR or Bar Code technology shall be utilized to recognize the Juror ID and index the Juror questionnaire accordingly.  |          |   |                      |
| 6.04             | The voter registration certificate number and/or driver's license number shall be included with the bar code as well.  |          |   |                      |
| 6.05             | Use the OCR / Bar Code to automatically capture attendance. Lists of attendees, no-shows, and those individuals selected for panels, etc. shall be available for user reporting. |          |   |                      |
| 6.06             | The system shall enable the user to pull a jury panel from the juror list and print / display (online) an ordered copy of the Juror questionnaire.                               |          |   |                      |

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| 6.07             | shuffle the juror panel based on a request from the judge. There shall be no limit to the number of times a juror panel can be shuffled, but shall be able to be configurable by the systems administrator. |          |   |                      |
| 6.08             | The capability to scan for marked exemptions / disqualifications shall be provided.   |          |   |                      |
| 6.09             | undelivered, exempt, disqualified, rescheduled, reported, no-shows), at the detail and summary levels shall be supported. These reports shall be viewable online, user definable, and created in real time. |          |   |                      |
| 6.10             | The system shall be capable of printing letters upon request. Requesting the letter shall be simplified using the bar coded summons or juror badge.   |          |   |                      |
| 6.11             | another juror pool, the system shall timestamp the date/time of the transaction and record the user who completed the transaction.  |          |   |                      |

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| 6.12             | While performing multiple functions on a specific juror file, the system shall allow the user to open other functions in the system without saving/closing the specific juror maintenance screen.                    |          |   |                      |
| 6.13             | The system shall allow non-response letters or FTA letters to be re-printed in case there is a printer problem with printing out the letter.   |          |   |                      |
| 6.14             | The system shall provide for adding additional documentation to denied letters as well as creating new letters within the system.  |          |   |                      |
| 6.15             | When creating non-response letter or FTA letter, the system shall automatically re-assign jurors to a new pool and include the date and time (e.g. 8:30am) from that pool.   |          |   |                      |
| 6.16             | The system shall allow automatic purging of Juror personal information after specified period of times as outlined in Chapter 62 of Texas Government Code and the Texas State Library retention schedules applicable |          |   |                      |
| 6.17             | The system shall allow for the creation of an excusal letter.  |          |   |                      |

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| 6.18             | The system shall provide an audible/visible alarm when a juror appears on their summons date, but has already been disqualified, excused, or deferred. The user shall be able to remove the status if needed.  |          |   |                      |
| 6.19             | The system shall provide the capability to re-assign jurors who appear on a day other than the date they were originally summoned for.   |          |   |                      |
| 6.20             | The system shall provide the capability to create panels, judge's lists, bio-forms, and random lists to be automatically created in PDF files that can be printed or emailed to the courts. The system shall provide the capability to print a judge's list once it's created. |          |   |                      |
| 6.21             | The system shall provide the ability to reprint a judge's list after the event is archived.  |          |   |                      |
| 6.22             | The system shall not return unused jurors to the general pool in case we have to correct dates of attendance or pay.   |          |   |                      |
| 6.23             | The system shall allow for the changing of juror information after the juror has been paid.  |          |   |                      |

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| 6.24             | The system shall automatically, permanently disqualify jurors who claim deceased, over 70 years of age, or non-resident after confirmation.  |          |   |                      |
| 6.25             | The central jury room currently has the capability to project onto two large screens video/DVD and power point displays, as well as cable TV. The proposed system shall have the capability to project the names of jurors assigned to a specific panel. As juror names are called, their names will be displayed on the screens so that they can see where they have been assigned. |          |   |                      |
|                  |  |          |   |                      |
| 7.00             | <b>JURY WHEEL PROCESSING</b>   |          |   |                      |
| 7.01             | Wheel to be refreshed when the juror name pool is exhausted, or when Texas Secretary of State issues an updated Jury Wheel. This occurs approximately every 2 years.   |          |   |                      |
| 7.02             | A flexible data interface shall be available to accept Jury Wheel data as provided by the State.   |          |   |                      |

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| 7.03             | Collin County's large population dictates that the proposed system's Jury Wheel process shall support more than 600,000 prospective jurors.   |          |   |                      |
| 7.04             | A report detailing the individual records of the wheel shall be provided.   |          |   |                      |
| 7.05             | The prospective system shall provide user requested Summary Reports of the Jury Wheel.  |          |   |                      |
|                  |   |          |   |                      |
| <b>8.00</b>      | <b>JURY PAYMENT/ACCOUNTING</b>  |          |   |                      |
| 8.01             | The proposed system shall support juror payment processing and the appropriate bookkeeping and audit functions. Actual payment processes may vary and could possibly include physically printing checks, creating a check print file to input into another system supporting vouchers, or cash dispensing machines. |          |   |                      |
| 8.02             | The proposed system shall support standard payment recording and tracking, regardless of the disbursement processes used by the County.   |          |   |                      |

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| 8.03             | The proposed system will be required to provide a pay rate that can be varied for multi-day service. The pay rate shall be configurable by the JMS Administrator.   |          |   |                      |
| 8.04             | provided and the ability to update agencies as needed. As required by the Chapter 61.003 of the Texas Government Code, a juror may donate all or a specific amount each day of jury service. A register of donated jury pay shall be created detailing each donated amount and providing totals, including rate changes, multiday service, name and amount designated for each non- |          |   |                      |
| 8.05             | The system shall have the flexibility to implement legislative changes regarding the payment of jurors.   |          |   |                      |
| 8.06             | At times, a jury may be paid at a rate set by the Commissioners Court. The ability to set a special pay rate for all members of a particular jury shall be supported. Minimally, the system shall not restrict paying specified jurors at an exception rate. The pay limit shall be configurable by the Jury Clerk Administrator.   |          |   |                      |

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| 8.07             | Allow juror record payment adjustments. All adjustments shall be recorded in the juror's history.   |          |   |                      |
| 8.08             | IRS Form 1099 Fees Limit - the system shall be configurable, based on a given date range, for any juror paid fees over the IRS established limit for any given year. Although the limit is currently \$600, this limit shall be configurable by the System Administrator. |          |   |                      |
| 8.09             | Ability to include payments for grand jurors.   |          |   |                      |
| 8.10             | The system shall have controls to ensure that a juror is not allowed to be paid for jury service on more than one case at a time. It shall also ensure that jurors are cannot receive duplicate payments for any given payment date.                                      |          |   |                      |
| 8.11             | include all jury payroll components required by the County, including the creation of a Jury Payroll Extract file.  |          |   |                      |
| 8.12             | Include the ability to run payrolls, which can be run based on a specific date or date range designated by County staff.  |          |   |                      |

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| 8.13             | The supplemental payroll runs may require the ability to make payroll adjustments or requests which would be added to a juror's history as part of an audit trail.   |          |   |                      |
| 8.14             | Ability for the County to configure a maximum juror payment fee cap for a given time period. For example, the maximum amount allowed may be \$300 per pay period.  |          |   |                      |
| 8.15             | Provide an error or exception report for any juror payroll record that exceeds the maximum amount designated.  |          |   |                      |
| 8.16             | with the Jury Extract File for reconciliation. The reports shall be in a format accepted by the County and JMS system and may be configurable and customizable by the user. They shall also be exportable in specified formats (e.g. Word, Crystal Report, Excel, and PDF) and can be saved on a local or network drive. The reports shall reflect correct amounts per County business rules for juror payments. |          |   |                      |

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|------------------|--|----------|---|----------------------|
| 8.17             | Produce the following report: Summary Report – summarizes jury payroll. This report shall be configurable to accept any range of payment dates. It shall also validate the Jury Payroll Extract file generated at any given time.  |          |   |                      |
| 8.18             | Produce the following report: Detailed Report – reflects each juror's payroll record. This report shall be configurable to accept any range of payment dates. It shall also validate any Jury Payroll Extract file generated at any given time.  |          |   |                      |
| 8.19             | Payroll Exception Reports.   |          |   |                      |
| 8.20             | IRS Form 1099 Report – generates a detailed report, based on a given date range, for any juror paid over the IRS established limit for any given year. The report shall contain all information stored in the JMS for a juror to meet IRS Form 1099 reporting requirements, including but not limited to Name, Address, and total amount paid. |          |   |                      |

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| 8.21             | shall generate a log or audit report reflecting all users of the system who conduct payment activities in the JMS. The report shall detail the employee's name, the payment activity recorded, as well as identify any payment adjustments or overrides performed in the JMS by the employee. The adjusted juror's record/identifier and date of transaction shall also be included. |          |   |                      |
| 8.22             | Allow all reports and logs to be printed to local and network printers.  |          |   |                      |
| 8.23             | Allow a juror to donate all or a portion of their jury pay on the day they completed their jury duty.  |          |   |                      |
| 8.24             | Ability to allow a juror to donate their jury pay at the time they complete their summons questionnaire.   |          |   |                      |
| 8.25             | Allow the payment of jury pay to Grand Jurors who are not selected from the Jury Wheel (manual entry of jurors that bypass the Jury Wheel).  |          |   |                      |
| 8.26             | Capability to automatically generate payment at the time of service for jurors, in order to reduce the cost of postage and envelopes.  |          |   |                      |

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| 8.27             | the County requires the ability to create a Juror Payroll Extract File in conformance with the County's accounting software (Sungard OneSolution). The Juror Payroll extract process shall automatically generate associated download files in a format defined by the County. The system will provide a menu item on the JMS that created an extract file for the Sungard |          |   |                      |
| 8.28             | Juror Payroll Requirements – Manual - A Jury system the County user may select one or more qualified jurors for manual check payment that shall also produce an extract file using the same Sungard OneSolution requirements   |          |   |                      |
| <b>9.00</b>      | <b>ARCHIVING REQUIREMENTS</b>  |          |   |                      |
| 9.01             | Ability to retrieve data from the previous Jury Wheel.   |          |   |                      |
| 9.02             | inquiry and reporting functions, of the prior Jury Wheel records shall be available as allowable under Chapter 62 of the Texas Government Code.  |          |   |                      |

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|------------------|--|----------|---|----------------------|
| 10.00            | <b>CONVERSION/MIGRATION REQUIREMENTS</b>   |          |   |                      |
| 10.01            | Convert/migrate all data and information from the current eJuror system to the new system.   |          |   |                      |
| 11.00            | <b>REPORTING REQUIREMENTS</b>  |          |   |                      |
| 11.01            | All reports shall be produced in real-time, not in a batch or over-night process.  |          |   |                      |
| 11.02            | Reporting options (e.g. sorting, inclusion/exclusion, etc.) shall be user configurable and easy to change from one report request to the next                    |          |   |                      |
| 11.03            | The system shall provide a report of those who appeared, but did not respond to the jury questionnaire.  |          |   |                      |
| 11.04            | The system shall provide statistical reports in Crystal Report or MS Excel format. Data shall be displayed on the reports in numbers and as well as percentages. |          |   |                      |
| 11.05            | The system shall provide capability to select multiple courts to run statistical reports   |          |   |                      |

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| 11.06            | The system shall provide a daily log of jurors assisted by the clerks (a unique report of jurors assisted by each clerk).   |          |   |                      |
| 11.07            | Allow for the creation of Disqualification Reports based on Texas Government Code requirements to be sent electronically to the Collin County Election's department.  |          |   |                      |
| 11.08            | Allow for the creation of a 'Non-Citizen' report based on Texas Government Code requirements  |          |   |                      |
| 11.09            | Provide for separate 'Excuse' and 'Disqualification' lists.   |          |   |                      |
| 11.10            | Track jury panels that 'bust' (the court needed more jurors to select from).  |          |   |                      |
| 11.11            | Reporting capabilities and data fields consistent with National Center for State Court performance measures for juries. <a href="http://www.courtools.org/~media/Microsites/Files/CourTools/courtools_Trial_measure8_Effective_Use_Of_Jurors.ashx">http://www.courtools.org/~media/Microsites/Files/CourTools/courtools_Trial_measure8_Effective_Use_Of_Jurors.ashx</a> |          |   |                      |
| 12.00            | <b>KIOSK FUNCTIONALITY/ INTEGRATION WITH JMS</b>  |          |   |                      |

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| 12.01            | Juror may check-in at a kiosk which will print a ticket/badge after successful check-in.  |          |   |                      |
| 12.02            | When checking-in, the juror can opt to donate their jury pay on the day of their service.   |          |   |                      |
| 12.03            | While juror is checking in, the system shall confirm the juror's name, driver's license, date of birth, and address is correct.   |          |   |                      |
| 12.04            | The system shall allow for the creation of one-day attendance letters upon check-out.   |          |   |                      |
| 12.05            | The system shall have the capability to allow for a person to be paid by using a 'check-out' function that produces a check that the juror can leave with.                      |          |   |                      |
| <b>13.00</b>     | <b>SYSTEM ADMINISTRATION AND SECURITY</b>   |          |   |                      |
| 13.01            | Provide the ability to review and modify tables that identify independent court location environments which establish each location's data, parameters and payment information. |          |   |                      |

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| 13.02            | administrator to set the means and parameters to include, but not be limited to, FTA deferrals, deferral guidelines, re-summonsing exemption period, and per diem amounts.  |          |   |                      |
| 13.03            | Provide the ability to review and modify system maintenance tables.   |          |   |                      |
| 13.04            | Provide the ability to establish various levels of security profiles for any individual assigned a valid user identification password and tailor each security level according to the user's unique operational requirements. |          |   |                      |
| 13.05            | Provide an audit feature for tracking user activity.  |          |   |                      |
| 13.06            | System tables containing application variables, parameters, codes and descriptions shall be accessible to the System Administrators for update.   |          |   |                      |
| 13.07            | System Security is to be available at multiple levels: User [IDs and Passwords], transaction, report, field, etc.   |          |   |                      |

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| 13.08            | Allow the System Administrators to define who may access the system and what data the user will be permitted to view or update.                         |          |   |                      |
| 13.09            | Audit and system logs shall be available. Any updates to data shall be recorded in the logs and available for reporting / review.                       |          |   |                      |
|                  | <b>JURY INTERACTIVE WEB RESPONSE (IWR)</b>  |          |   |                      |
| 14.00            | <b>WEB BASED FUNCTIONALITIES</b>  |          |   |                      |
| 14.01            | Require the juror to log in using a juror identification number and a unique identifier, such as name, date of birth, or Texas driver's license number. |          |   |                      |
| 14.02            | Provide a security feature that automatically logs off a juror after a designated time of inactivity.   |          |   |                      |
| 14.03            | certain biographical information requested on the juror questionnaire. The juror shall not be able to modify birthdate or driver's license numbers.     |          |   |                      |

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| 14.04            | requests for excuse and disqualification of his/her jury service and provide an electronic means of reviewing these requests. The application shall update the JMS for certain excuse types and provide the ability to notify the juror, by email or text message, that his/her request was received and whether the user has approved (or denied) the juror's request. |          |   |                      |
| 14.05            | Provide the user a means of viewing, saving and printing juror requests received via the web application for processing.  |          |   |                      |

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| 14.06            | <p>reschedule their jury service within specific postponement guidelines established by the County. The application shall verify the juror's eligibility for postponement according to the juror's original summons date available in the JMS database. If the juror is not eligible for postponement, a message will notify juror. If the juror is eligible for a postponement, the system shall provide the juror with a date range and option to enter a selected date. The system will update juror's record in the JMS database with the selected date and generate notification according to</p> |          |   |                      |
| 14.07            | <p>information regarding their jury service to include type, location, date, time, and other pertinent jury service information. The application will also indicate the juror's status regarding a previously submitted request.</p>   |          |   |                      |

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| 14.08            | Allow the juror to view all dates of attendance and payments for their current jury service and any historical service as allowed by the Chapters 61 and 62 of the Texas Government Code.  |          |   |                      |
| 14.09            | Ability to provide links to Jury Web page information on the Court's Web site depending on assigned court location. The application shall also provide links to informational Web sites including the Collin County District Clerk's website and a Jury Services contact email and interactive maps. |          |   |                      |
| 14.10            | Web capability to provide information and allow summoned jurors to postpone service and, file an exemption, and provide reasons for disqualification shall be provided 24x7x365 in a secure web site.  |          |   |                      |
| 14.11            | Allow for the web based completion of the Juror Questionnaire.   |          |   |                      |
| 14.12            | The system will be able to alert a juror of their status by phone, email, and/or text message.   |          |   |                      |

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|------------------|--|----------|---|----------------------|
| 14.13            | Auto-confirm availability after the online questionnaire is completed by the juror.  |          |   |                      |
| 14.14            | Include an IVR interface. This interface shall include an API between the new system and the County's current phone system.  |          |   |                      |
| 14.15            | Provide for an extract file to be created for all Jury checks issued in the system. This file can then be sent to the County's financial system for processing.  |          |   |                      |
|                  |  |          |   |                      |
|                  | <b>JURY INTERACTIVE VOICE RESPONSE (IVR)</b>   |          |   |                      |
| <del>15.00</del> | <del>IVR SYSTEM FUNCTIONALITIES</del>  |          |   |                      |
| <del>15.01</del> | <del>Allow prospective jurors to identify themselves over the telephone using his/her juror ID number or his/her name and a unique identifier, such as date of birth, to obtain basic information regarding his/her jury service without talking to a Jury Services staff member. The system shall provide both touchtone keypad and speech recognition.</del> |          |   |                      |

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| 15.02            | <p><del>Provide the ability for granting and committing a court user defined number of postponements within a predefined limited time period. The deferrals granted or denied shall be automatically entered into the juror history database. Subsequent postponements requests (exceeding the limits) shall be routed to a Jury Services staff member for review. Postponements to a new quarter require re-summoning. The system shall also assist jurors who are requesting to be excused by providing additional information as to eligibility or by transferring them to a Jury Services staff member during</del></p> |          |   |                      |
| 15.03            | <p><del>Provide the ability to check jury service instructions specific to an assigned court location, confirm the juror's service date, and check whether the Jury Services has received and approved (or denied) the juror's excuse or deferral request.</del></p>  |          |   |                      |

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| <del>15.04</del> | <del>Provide information/instructions to the juror to include, but not be limited to, term of service, court location, business hours, directions, parking, juror payment information, requesting an excuse, disqualification or postponement of jury</del> |          |   |                      |
| <del>15.05</del> | <del>Provide jurors with payment information and inform when juror payment was generated and the amount of reimbursement including if any amount was donated.</del>   |          |   |                      |
| <del>15.06</del> | <del>Allow a juror to request a verification letter of his/her jury attendances to provide to his/her employer or for his/her records.</del>  |          |   |                      |
| <del>15.07</del> | <del>Allow jurors to use the automated phone system to determine whether they need to report or call back. The system shall provide instructions as to where to report.</del>   |          |   |                      |

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|------------------|---|----------|---|----------------------|
| <del>15.08</del> | <del>Work with multiple- phone lines, processing thousands of calls per month as well as processing simultaneous calling. Contractor's proposal shall clearly identify system capacity for the capability to work with multiple phone lines, maximum and minimum calling capacity, and simultaneous calling capacity and thresholds, scalability and expandability.</del> |          |   |                      |
| <del>15.09</del> | <del>Provide the ability to queue callers when all ports are busy and provide the approximate amount of wait time to speak to a Jury clerk. During heavy call volume, the system shall allow the caller the option to input a telephone contact number whereby the system can dial the caller back when the next Jury clerk is available during business hours.</del>     |          |   |                      |

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| <del>15.10</del> | <del>Ability to provide jurors with reminder notices by telephone call, email, or text message, using jurors' area code and telephone number. The system shall also allow jury staff to update call-in information by creating messages unique to summoned prospective jurors and activate system functionalities.—</del> |          |   |                      |
| <del>15.11</del> | <del>Ability to provide real time monitoring by authorized personnel on a standard desktop PC while operating other applications.—</del>  |          |   |                      |
| <del>15.12</del> | <del>Provide a Web based system administration that allows the system administrator to perform record maintenance on call data by archiving or removing old call data to increase the</del>   |          |   |                      |
| <del>15.13</del> | <del>Provide a Web based system administration that allows the system administrator to change system settings and the designated operating and holiday hours of the Jury representatives.—</del>  |          |   |                      |

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| <del>15.14</del> | <del>Provide a Web based system administration that allows the system administrator to change the password needed to gain access to the system administration utility.—</del> |          |   |                      |
| <del>15.15</del> | <del>Provide a Web based system administration that allows the system administrator to manage voice files for use in various unexpected or preplanned situations.—</del>      |          |   |                      |
| <del>16.00</del> | <del><b>INTERACTIVE VOICE RESPONSE (IVR)—</b></del>   |          |   |                      |
| <del>16.01</del> | <del>IVR system integrated with the JMS.—</del>   |          |   |                      |
| <del>16.02</del> | <del>Ability to connect to remote databases.—</del>   |          |   |                      |
| <del>16.03</del> | <del>Expandable to future systems that may need to employ this technology.—</del>   |          |   |                      |
| <del>16.04</del> | <del>Support at least 500 calls per week and shall be able to support up to 64 ports.—</del>  |          |   |                      |
| <del>16.05</del> | <del>Accommodate multiple IVR applications and databases.—</del>  |          |   |                      |
| <del>16.06</del> | <del>Ability to add scripts and modify scripts as changes occur.—</del>   |          |   |                      |
| <b>17.00</b>     | <b>SPECIFIC REQUIREMENTS</b>  |          |   |                      |

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| 17.01            | Support at least 150,000 hits per year.  |          |   |                      |
| 17.02            | Provide access to its features via API calls or web services.  |          |   |                      |
| 17.03            | Ability to connect to remote databases.  |          |   |                      |
| 17.04            | Support email integration with Microsoft Outlook and Exchange Server.  |          |   |                      |
| 17.05            | Since this is a public facing system, the proposed IWR system shall have safeguards in place to prevent all data mining. |          |   |                      |