

Solicitation 2013-179

Jury Management System

Bid designation: Public



Collin County

Bid 2013-179 Jury Management System

Bid Number	2013-179
Bid Title	Jury Management System
Bid Start Date	In Held
Bid End Date	Jun 27, 2013 2:00:00 PM CDT
Question & Answer End Date	Jun 21, 2013 5:00:00 PM CDT
Bid Contact	Courtney Wilkerson Contract Administrator Purchasing 972-548-4113 cwilkerson@co.collin.tx.us
Contract Duration	One Time Purchase
Contract Renewal	Not Applicable
Prices Good for	90 days
Pre-Bid Conference	Jun 11, 2013 2:30:00 PM CDT Attendance is optional Location: Central Jury Room 2100 Bloomdale McKinney, TX 75071
Standard Disclaimer	<p>***Note to Bidders/Offerors~The following standard disclaimer applies to Invitation to Bid (IFB), Competitive Sealed Proposal (CSP), and Request for Proposal (RFP) ONLY, not applicable to Request for Qualifications (RFQ) or Request for Information (RFI).***</p> <p>Mailing Address: Collin County Purchasing 2300 Bloomdale Rd., Ste 3160 McKinney, TX 75071</p> <p>Prices bid/proposed shall only be considered if they are provided in the appropriate space (s) on the Collin County bid form(s). For consideration, any additions or deductions to the bid/proposal prices offered must be shown under the exceptions section of the bid/proposal in the case of electronic submittal, ONLY in the case of a hard copy submittal will an additional attachment be allowed. Extraneous numbers, prices, comments, etc. or bidder/offeror generated documents appearing elsewhere on the bid or as an additional attachment shall be deemed to have no effect on the prices offered in the designated locations.</p> <p>All delivery and freight charges (F.O.B. inside delivery at Collin County designated locations) are to be included as part of the bid/quote/proposal price. All components required to render the item complete, installed and operational shall be included in the total bid/quote/proposal price. Collin County will pay no additional freight/delivery/installation/setup fees.</p>
Bid Comments	Collin County's intent of this Request For Proposal (RFP) and resulting contract is to provide contractors with sufficient information to prepare a proposal providing a comprehensive Jury Management System, ability to interface with current Interactive Voice Response (IVR) system via API 's, and Interactive Web Response.

Item Response Form

Item	2013-179--01-01 - Please state your grand total cost for 5 years based upon attachment B.
Quantity	1 lot
Unit Price	<input style="width: 150px; height: 20px;" type="text"/>

Delivery Location **Collin County**
 Collin County - See P.O.
 2300 Bloomdale Rd., Ste. 3160
 ** See P.O. for Job Site **
 McKinney TX 75071
 Qty 1

Description

Please state your grand total cost for 5 years based upon Attachment B-Jury Management System-Pricing table, total cost summary.



COLLIN COUNTY, TEXAS TERMS AND CONDITIONS

1.0 GENERAL INSTRUCTIONS

1.0.1 Definitions

1.0.1.1 Bidder/Quoter/Offeror: refers to submitter.

1.0.1.2 Vendor/Contractor/Provider: refers to a Successful Bidder/Quoter/Contractor/Service Provider.

1.0.1.3 Submittal: refers to those documents required to be submitted to Collin County, by a Bidder/Quoter/Offeror.

1.0.1.4 IFB: refers to Invitation For Bid.

1.0.1.5 RFQ: refers to Request For Qualifications

1.0.1.6 RFP: refers to Request For Proposal.

1.0.1.7 RFI: refers to Request For Information.

1.0.1.8 CSP: refers to Competitive Sealed Proposal

1.0.1.9 Quotation: refers to Request for Quotation

1.1 If Bidder/Quoter/Offeror do not wish to submit an offer at this time, please submit a No Bid Form.

1.2 Awards shall be made not more than ninety (90) days after the time set for opening of submittals.

1.3 Collin County is always conscious and extremely appreciative of your time and effort in preparing your submittal.

1.4 Collin County exclusively uses BidSync for the notification and dissemination of all solicitations. The receipt of solicitations through any other company may result in your receipt of incomplete specifications and/or addendums which could ultimately render your bid non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other company.

1.5 A bid/quote/submittal may not be withdrawn or canceled by the bidder/quoter/offeror prior to the ninety-first (91st) day following public opening of submittals and only prior to award.

1.6 It is understood that Collin County, Texas reserves the right to accept or reject any and/or all Bids/Quotes/Proposals/Submittals for any or all products and/or services covered in an Invitation For Bid (IFB), Request For Qualifications (RFQ), Request For Proposal (RFP), Request For Information (RFI), Competitive Sealed Proposal (CSP), and Quotation, and to waive informalities or defects in submittals or to accept such submittals as it shall deem to be in the best interest of Collin County.

1.7 All IFB's, RFP's, CSP's, RFQ's, and RFI's submitted in hard copy paper form shall be submitted in a sealed envelope, plainly marked on the outside with the IFB/RFP/RFQ/RFI/CSP/Quotation number and name. A hard copy paper form submittal shall be manually signed in ink by a person having the authority to bind the firm in a contract. Submittals shall be mailed or hand delivered to the Collin County Purchasing Department.

1.8 No oral, telegraphic or telephonic submittals will be accepted. IFB's, RFP's, RFQ's, CSP's, and RFI's, may be submitted in electronic format via **BidSync**.

1.9 All Invitation For Bids (IFB), Request For Proposals (RFP), Request For Qualifications (RFQ), Competitive Sealed Proposals (CSP), and Request For Information (RFI), submitted electronically via **BidSync** shall remain locked until official date and time of opening as stated in the Special Terms and Conditions of the IFB, RFP, RFQ, CSP, and/or RFI.

1.10 Time/date stamp clock in Collin County Purchasing Department shall be the official time of receipt for all Invitation For Bids (IFB), Request For Proposals (RFP), Request For Qualifications (RFQ), Competitive Sealed Proposals (CSP), Request For Information (RFI), submitted in hard copy paper form. IFB's, RFP's, RFQ's, CSP's, RFI's, received in County Purchasing Department after submission deadline shall be considered void and unacceptable. Absolutely no late submittals will be considered. Collin County accepts no responsibility for technical difficulties related to electronic submittals.

1.11 For hard copy paper form submittals, any alterations made prior to opening date and time must be initialed by the signer of the IFB/RFQ/RFP/CSP/RFI/, guaranteeing authenticity. Submittals cannot be altered or amended after submission deadline.

1.12 Collin County is by statute exempt from the State Sales Tax and Federal Excise Tax; therefore, the prices submitted shall not include taxes.

1.13 Any interpretations, corrections and/or changes to an Invitation For Bid/Request For Qualifications/Request For Proposal/Request for Information/Competitive Sealed Proposal, and related Specifications or extensions to the opening/receipt date will be made by addenda to the respective document by the Collin County Purchasing Department. Questions and/or clarification requests must be submitted no later than seven (7) days prior to the opening/receipt date. Those received at a later date may not be addressed prior to the public opening. Sole authority to authorize addenda shall be vested in Collin County Purchasing Agent as entrusted by the Collin County Commissioners' Court. Addenda may be transmitted electronically via **BidSync**, by facsimile, E-mail transmission or mailed via the US Postal Service.

1.13.1 Addenda will be transmitted to all that are known to have received a copy of the IFB/RFQ/RFP/RFI/CSP and related Specifications. However, it shall be the sole responsibility of the Bidder/Quoter/Offeror to verify issuance/non-issuance of addenda and to check all avenues of document availability (i.e. **BidSync** at www.bidsync.com, telephoning Purchasing Department directly, etc.) prior to opening/receipt date and time to insure Bidder/Quoter/Offeror's receipt of any addenda issued. Bidder/Quoter/Offeror shall acknowledge receipt of all addenda.

1.14 All materials and services shall be subject to Collin County approval.

1.15 Collin County reserves the right to make award in whole or in part as it deems to be in the best interest of the County.

1.16 The Bidder/Quoter/Offeror shall comply with Commissioners' Court Order No. 96-680-10-28, Establishment of Guidelines & Restrictions Regarding the Acceptance of Gifts by County Officials & County

Employees.

1.17 Any reference to model/make and/or manufacturer used in specifications is for descriptive purposes only. Products/materials of like quality will be considered.

1.18 Bidders/Quoters/Offerors taking exception to the specifications shall do so at their own risk. By offering substitutions, Bidder/Quoter/Offeror shall state these exceptions in the section provided in the IFB/RFQ/RFP/CSP/Quotation or by attachment. Exception/substitution, if accepted, must meet or exceed specifications stated therein. Collin County reserves the right to accept or reject any and/or all of the exception(s)/substitution(s) deemed to be in the best interest of the County.

1.19 Minimum Standards for Responsible Prospective Bidders/Quoters/Offerors: A prospective Bidder/Quoter/Offeror must meet the following minimum requirements:

- 1.19.1 have adequate financial resources, or the ability to obtain such resources as required;
- 1.19.2 be able to comply with the required or proposed delivery/completion schedule;
- 1.19.3 have a satisfactory record of performance;
- 1.19.4 have a satisfactory record of integrity and ethics;
- 1.19.5 be otherwise qualified and eligible to receive an award.

Collin County may request documentation and other information sufficient to determine Bidder's/Quoter's/Offeror's ability to meet these minimum standards listed above.

1.20 Vendor shall bear any/all costs associated with it's preparation of an RFI/IFB/RFQ/RFP/CSP/Quotation submittal.

1.21 Public Information Act: Collin County is governed by the Texas Public Information Act, Chapter 552 of the Texas Government Code. All information submitted by prospective bidders during the bidding process is subject to release under the Act.

1.22 The Bidder/Quoter/Offeror shall comply with Commissioners' Court Order No. 2004-167-03-11, County Logo Policy.

1.23 Interlocal Agreement: Successful bidder agrees to extend prices and terms to all entities that has entered into or will enter into joint purchasing interlocal cooperation agreements with Collin County.

1.24 Bid Openings: All bids submitted will be read at the county's regularly scheduled bid opening for the designated project. However, the reading of a bid at bid opening should be not construed as a comment on the responsiveness of such bid or as any indication that the county accepts such bid as responsive.

The county will make a determination as to the responsiveness of bids submitted based upon compliance with all applicable laws, Collin County Purchasing Guidelines, and project documents, including but not limited to the project specifications and contract documents. The county will notify the successful bidder upon award of the contract and, according to state law; all bids received will be available for inspection at that time.

2.0 TERMS OF CONTRACT

2.1 A bid/quote/proposal, when properly accepted by Collin County, shall constitute a contract equally binding between the Vendor/Contractor/Provider and Collin County. No different or additional terms will become part of this contract with the exception of an Amendment and/or a Change Order.

2.2 No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All Amendments and/or Change Orders to the contract will be made in writing by Collin County Purchasing Agent.

2.3 No public official shall have interest in the contract, in accordance with Vernon's Texas Codes Annotated, Local Government Code Title 5, Subtitle C, Chapter 171.

2.4 The Vendor/Contractor/Provider shall comply with Commissioners' Court Order No. 96-680-10-28, Establishment of Guidelines & Restrictions Regarding the Acceptance of Gifts by County Officials & County Employees.

2.5 Design, strength, quality of materials and workmanship must conform to the highest standards of manufacturing and engineering practice.

2.6 Bids/Quotes/Proposals must comply with all federal, state, county and local laws concerning the type(s) of product(s)/service(s)/equipment/project(s) contracted for, and the fulfillment of all ADA (Americans with Disabilities Act) requirements.

2.7 All products must be new and unused, unless otherwise specified, in first-class condition and of current manufacture. Obsolete products, including products or any parts not compatible with existing hardware/software configurations will not be accepted.

2.8 Vendor/Contractor/Provider shall provide any and all notices as may be required under the Drug-Free Work Place Act of 1988, 28 CFR Part 67, Subpart F, to its employees and all sub-contractors to insure that Collin County maintains a drug-free work place.

2.9 Vendor/Contractor/Provider shall defend, indemnify and save harmless Collin County and all its officers, agents and employees and all entities, their officers, agents and employees who are participating in this contract from all suits, claims, actions, damages (including personal injury and or property damages), or demands of any character, name and description, (including attorneys' fees, expenses and other defense costs of any nature) brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of Vendor/Contractor/Provider's breach of the contract arising from an award, and/or any negligent act, error, omission or fault of the Vendor/Contractor/Provider, or of any agent, employee, subcontractor or supplier of Vendor/Contractor/Provider in the execution of, or performance under, any contract which may result from an award. Vendor/Contractor/Provider shall pay in full any judgment with costs, including attorneys' fees and expenses which are rendered against Collin County and/or participating entities arising out of such breach, act, error, omission and/or fault.

2.10 If a contract, resulting from a Collin County IFB, RFP, RFQ, CSP, Quotation is for the execution of a public work, the following shall apply:

2.10.1 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Payment Bond if the contract is in excess of \$25,000.00. Such bond shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56th Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.10.2 In accordance with V.T.C.A. 2253.021, a governmental agency that makes a public work contract with a prime contractor shall require the contractor, before beginning work, to execute to the governmental entity a Performance Bond if the contract is in excess of \$100,000.00. Such bond shall be in the amount of the contract payable to the governmental entity and must be executed by a corporate surety in accordance with Section 1, Chapter 87, Acts of the 56th Legislature, Regular Session, 1959 (Article 7.19-1 Vernon's Texas Insurance Code).

2.11 Purchase Order(s) shall be generated by Collin County to the vendor. Collin County will not be responsible for any orders placed/delivered without a valid purchase order number.

2.12 The contract shall remain in effect until any of the following occurs: delivery of product(s) and/or completion and acceptance by Collin County of product(s) and/or service(s), contract expires or is terminated by either party with thirty (30) days written notice prior to cancellation and notice must state therein the reasons for such cancellation. Collin County reserves the right to terminate the contract immediately in the event the Vendor/Contractor/Provider fails to meet delivery or completion schedules, or otherwise perform in accordance with the specifications. Breach of contract or default authorizes the County to purchase elsewhere and charge the full increase in cost and handling to the defaulting Vendor/Contractor/Provider.

2.13 Collin County Purchasing Department shall serve as Contract Administrator or shall supervise agents designated by Collin County.

2.14 All delivery and freight charges (FOB Inside delivery at Collin County designated locations) are to be included as part of the bid/quote/proposal price. All components required to render the item complete, installed and operational shall be included in the total bid/quote/proposal price. Collin County will pay no additional freight/delivery/installation/setup fees.

2.15 Vendor/Contractor/Provider shall notify the Purchasing Department immediately if delivery/completion schedule cannot be met. If delay is foreseen, the Vendor/Contractor/Provider shall give written notice to the Purchasing Agent. The County has the right to extend delivery/completion time if reason appears valid.

2.16 The title and risk of loss of the product(s) shall not pass to Collin County until Collin County actually receives and takes possession of the product(s) at the point or points of delivery. Collin County shall generate a purchase order(s) to the Vendor/Contractor/Provider and the purchase order number must appear on all itemized invoices.

2.17 Invoices shall be mailed directly to the Collin County Auditor's Office, 2300 Bloomdale Road, Suite 3100, McKinney, Texas 75071. All invoices shall show:

2.17.1 Collin County Purchase Order Number;

2.17.2 Vendor's/Contractor's/Provider's Name, Address and Tax Identification Number;

2.17.3 Detailed breakdown of all charges for the product(s) and/or service(s) including applicable time frames.

2.18 Payment will be made in accordance with V.T.C.A., Government Code, Title 10, Subtitle F, Chapter 2251.

2.19 All warranties shall be stated as required in the Uniform Commercial Code.

2.20 The Vendor/Contractor/Provider and Collin County agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.

2.21 The Vendor/Contractor/Provider agree to protect Collin County from any claims involving infringements of patents and/or copyrights.

2.22 The contract will be governed by the laws of the State of Texas. Should any portion of the contract be in conflict with the laws of the State of Texas, the State laws shall invalidate only that portion. The remaining portion of the contract shall remain in effect. The contract is performable in Collin County, Texas.

2.23 The Vendor/Contractor/Provider shall not sell, assign, transfer or convey the contract, in whole or in part, without the prior written approval from Collin County.

2.24 The apparent silence of any part of the specification as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the specification shall be made on the basis of this statement.

2.25 Vendor/Contractor/Provider shall not fraudulently advertise, publish or otherwise make reference to the existence of a contract between Collin County and Vendor/Contractor/Provider for purposes of solicitation. As exception, Vendor/Contractor/Provider may refer to Collin County as an evaluating reference for purposes of establishing a contract with other entities.

2.26 The Vendor/Contractor/Provider understands, acknowledges and agrees that if the Vendor/Contractor/Provider subcontracts with a third party for services and/or material, the primary Vendor/Contractor/Provider (awardee) accepts responsibility for full and prompt payment to the third party. Any dispute between the primary Vendor/Contractor/Provider and the third party, including any payment dispute, will be promptly remedied by the primary vendor. Failure to promptly render a remedy or to make prompt payment to the third party (subcontractor) may result in the withholding of funds from the primary Vendor/Contractor/Provider by Collin County for any payments owed to the third party.

2.27 Vendor/Contractor/Provider shall provide Collin County with diagnostic access tools at no additional cost to Collin County, for all Electrical and Mechanical systems, components, etc., procured through this contract.

2.28 Criminal History Background Check: If required, ALL individuals may be subject to a criminal history background check performed by the Collin County's Sheriff's Office prior to access being granted to Collin County. Upon request, Vendor/Contractor/Provider shall provide list of individuals to Collin County Purchasing Department within five (5) working days.

2.29 Non-Disclosure Agreement: Where applicable, vendor shall be required to sign a non-disclosure agreement acknowledging that all information to be furnished is in all respects confidential in nature, other than information which is in the public domain through other means and that any disclosure or use of same by vendor, except as provided in the contract/agreement, may cause serious harm or damage to Collin County. Therefore, Vendor agrees that Vendor will not use the information furnished for any purpose other than that stated in contract/agreement, and agrees that Vendor will not either directly or indirectly by agent, employee, or representative disclose this information, either in whole or in part, to any third party, except on a need to know basis for the purpose of evaluating any possible transaction. This agreement shall be binding upon Collin County and Vendor, and upon the directors, officers, employees and agents of each.

2.30 Vendors/Contractors/Providers must be in compliance with the Immigration and Reform Act of 1986 and all employees specific to this solicitation must be legally eligible to work in the United States of America.

2.31 Certification of Eligibility: This provision applies if the anticipated Contract exceeds \$100,000.00 and as it relates to the expenditure of federal grant funds. By submitting a bid or proposal in response to this solicitation, the Bidder/Quoter/Offeror certifies that at the time of submission, he/she is not on the Federal Government's list of suspended, ineligible, or debarred contractors. In the event of placement on the list between the time of bid/proposal submission and time of award, the Bidder/Quoter/Offeror will notify the Collin County Purchasing Agent. Failure to do so may result in terminating this contract for default.

2.32 Notice to Vendors/Contractors/Providers delivering goods or performing services within the Collin County Detention Facility: The Collin County Detention Facility houses persons who have been charged with and/or convicted of serious criminal offenses. When entering the Detention Facility, you could: (1) hear obscene or graphic language; (2) view partially clothed male inmates; (3) be subjected to verbal abuse or taunting; (4) risk physical altercations or physical contact, which could be minimal or possibly serious; (5) be exposed to communicable or infectious diseases; (6) be temporarily detained or prevented from immediately leaving the Detention Facility in the case of an emergency or "lockdown"; and (7) subjected to a search of your person or property. While the Collin County Sheriff's Office takes every reasonable precaution to protect the safety of visitors to the Detention Facility, because of the inherently dangerous nature of a Detention Facility and the type of the persons incarcerated therein, please be advised of the possibility of such situations exist and you should carefully consider such risks when entering the Detention Facility. By entering the Collin County Detention

Facility, you acknowledge that you are aware of such potential risks and willingly and knowingly choose to enter the Collin County Detention Facility.

2.33 Delays and Extensions of Time when applicable:

2.33.1 If the Vendor/Contractor/Provider is delayed at any time in the commence or progress of the Work by an act or neglect of the Owner or Architect/Engineer, or of an employee of either, or of a separate contractor employed by the Owner, or by changes ordered in the Work, or by labor disputes, fire, unusual delay in deliveries, unavoidable casualties or other causes beyond the Vendor/Contractor/Provider's control, or by delay authorized by the Owner pending mediation and arbitration, or by other causes which the Owner or Architect/Engineer determines may justify delay, then the Contract Time shall be extended by Change Order for such reasonable time as the Owner/Architect may determine.

2.33.2 If adverse weather conditions are the basis for a Claim for additional time, such Claim shall be documented by data substantiating that weather conditions were abnormal for the period of time and could not have been reasonably anticipated, and that the weather conditions had an adverse effect on the scheduled construction.

NOTE: All other terms and conditions (i.e. Insurance Requirements, Bond Requirements, etc.) shall be stated in the individual IFB/RFQ/RFP/RFI/CSP/Quotation Solicitation documents as Special Terms, Conditions and Specifications.

3.0 INSURANCE REQUIREMENTS

3.1 Before commencing work, the vendor shall be required, at its own expense, to furnish the Collin County Purchasing Agent with certified copies of all insurance certificate(s) indicating the coverage to remain in force throughout the term of this contract.

3.1.1 Commercial General Liability insurance at minimum combined single limits of (\$1,000,000 per-occurrence and \$2,000,000 general aggregate) for bodily injury and property damage, which coverage shall include products/completed operations, independent contractors, and contractual liability each at \$1,000,000 per occurrence. Coverage must be written on an occurrence form.

3.1.2 Workers Compensation insurance at statutory limits, including employers liability coverage at minimum limits. In addition to these, the contractor must meet each stipulation below as required by the Texas Workers Compensation Commission; (Note: If you have questions concerning these requirements, you are instructed to contact the TWCC at (512)440-3789).

3.1.3 Commercial Automobile Liability insurance shall be no less than \$500,000 combined single limits per accident for bodily injury and property damage, including owned, non-owned, and hired vehicle coverage.

3.1.4 Professional Liability Insurance at minimum limits of \$4,000,000. This policy must have a two (2) year extended period of coverage, (i.e. tail coverage). If you choose to have project coverage endorsed onto your base policy, this would be acceptable.

3.2 The required limits may be satisfied by any combination of primary, excess or umbrella liability insurances, provided the primary policy complies with the above requirements and the excess umbrella is following form. The vendor may maintain reasonable and customary deductibles, subject to approval by Collin County.

3.3 With reference to the foregoing insurance requirement, the vendor shall endorse applicable insurance policies as follows:

3.3.1 A waiver of subrogation in favor of Collin County, its officials, employees, volunteers and officers shall be contained in the workers compensation coverage.

3.3.2 The vendor's insurance coverage shall name Collin County as additional insured under the General Liability policy.

3.3.3 All insurance policies shall be endorsed to require the insurer to immediately notify Collin County of any decrease in the insurance coverage limits.

3.3.4 All insurance policies shall be endorsed to the effect that Collin County will receive at least thirty (30) days notice prior to cancellation, non-renewal or termination of the policy.

3.3.5 All copies of Certificates of Insurance shall reference the project/contract number.

3.4 All insurance shall be purchased from an insurance company that meets the following requirements:

3.4.1 A financial rating of B+VI or better as assigned by the BEST Rating Company or equivalent.

3.5 Certificates of Insurance shall be prepared and executed by the insurance company or its authorized agent, and shall contain provisions representing and warranting the following:

3.5.1 Sets forth all endorsements and insurance coverages according to requirements and instructions contained herein.

3.5.2 Sets forth the notice of cancellation or termination to Collin County.

4.0 EVALUATION CRITERIA AND FACTORS

The award of the contract shall be made to the responsible contractor whose proposal is determined to be the lowest and best evaluated offer resulting from negotiation, taking into consideration the relative importance of price and other factors set forth in the Request For Proposals in accordance with Vernon's Texas Code Annotated, Local Government.

The Evaluation Committee will review all proposals received by the Opening date and time as part of a documented evaluation process. For each decision point in the process, the County will evaluate contractors according to specific criteria and will elevate a certain number of contractors to compete against each other. The proposals will be evaluated on the following criteria.

Functionality, implementation support, on-going support, customer care, integration, reliability, ease of use, scalability, expandability and adaptability to new processes, applications and technologies will be extremely important in the evaluation/decision process. A strong track record for on-time delivery of these system(s) to organizations comparable in size to Collin County, Texas will be a significant factor in the award process.

The County reserves the right to determine the suitability of proposals on the basis of all of these criteria.

The County will use a competitive process based upon "selection levels." The County recognizes that if a contractor fails to meet expectations during any part of the process, it reserves the right to proceed with the remaining contractors or to elevate a contractor that was not elevated before. The selection levels are described in the following sections.

Level 1 - Procurement Requirements Assessment

Criteria assessed during Level 1:

- r Conformance with RFP guidelines and submittal requirements.

The first part of the elevation process is to validate the completeness of the proposal and ensure that all the RFP guidelines and submittal requirements are met. Those contractors who do not meet all the requirements for the RFP may, at the discretion of the County, be contacted to submit the missing information within two business days. Incomplete or noncompliant RFPs may be disqualified.

Level 2 – Detailed Proposal Assessment

The Evaluation Committee will conduct a detailed assessment of all proposals elevated to this Level. Criteria evaluated in Level 2:

- r Project Plan and Methodology– 20%
- r Successful implementation of Jury Systems in Counties of comparable size – 10%
-Contractors who have proven experience at sites similar in scope, size and complexity to the County will provide higher confidence to County evaluators. References may be called during this phase of the evaluation and the quality of the clients provided as references will be analyzed. Contractors who provide clients with active contracts are the most desirable. A strong track record for on-time delivery of these system(s) to organizations comparable in size to Collin County, Texas will be a significant factor in the award process. The listing of all public sector clients provided in the RFP will also be used during this evaluation.
- r Functionality and Capabilities of the Software/Response to Business Requirement – 40%
- r Financial health and stability of contractor – 10%
- County will analyze the contractor responses to Financial Statements.
- r Cost – 20%

It is anticipated that no more than three contractors will advance to Level 3 but Collin County reserves the right to adjust the number as necessary.

Level 3 - Demonstrations and Implementation Firm Interviews

ORAL PRESENTATIONS: The Evaluation Committee may hear oral presentations (if required). Contractors are cautioned, however, that oral presentations are at the sole discretion of the Committee and the Committee is not obligated to request it. The oral presentation is an opportunity for the County Evaluation Committee to ask questions and seek clarification of the proposal submitted. The presentation is not meant as an opportunity for the contractor to simply provide generic background information about the corporation or its experience. Thus, the time will be structured with a minimum time for the contractor to present and the majority of time dedicated to addressing questions from the Evaluation Committee. The oral presentations, if held, will be scheduled accordingly and all presenting contractors will be notified of time and date.

The following criteria is optional and will be used to evaluate those contractors elevated for interviews.

- r Interviews – 50%
- r Experience and References – 50%
-The County will contact the contractor's references. These references will be asked a series of questions regarding their satisfaction with the services being provided.

It is anticipated that no more than two contractors will advance to Level 4 but Collin County reserves the right to adjust the number as necessary.

Level 4 – Discovery Sessions

Contractors elevated to Level 4 will be asked to respond in writing to issues and questions raised by the County at the interviews, as well as any other cost and implementation planning considerations in the proposal, and may be invited to present their responses on-site. The County may choose to do site visits during this stage. The County reserves the right to bypass Level 3 in the evaluation process and move directly to Discovery Sessions. Criteria evaluated during this phase include:

- r Updated Project Plan & Methodology – 20%
- r Updated Cost – 30%
- r Functionality and Capabilities of the Software/Response to Business Requirement– 50%

Based on the information collected in this phase, a single contractor will be identified as the finalist for contract negotiations. If a contract cannot be reached after a period of time deemed reasonable by the County, it reserves the right to contact any of the other contractors that have submitted bids and enter into negotiations with them.

Level 5 –Best and Final Offer

BEST AND FINAL OFFERS: Collin County reserves the right at its sole option to extend a Best and Final Offer (BAFO) opportunity to any or all of the top scoring contractors. Contractors may be asked to submit additional information specific to program specifications and cost.

5.0 SPECIAL CONDITIONS AND SCOPE OF SERVICES

5.1 Authorization: Proposals will be received for Services: Jury Management System.

5.2 Intent of Request for Proposal: Collin County's intent of this Request For Proposal (RFP) and resulting contract is to provide contractors with sufficient information to prepare a proposal providing a comprehensive Jury Management System, ability to interface with current Interactive Voice Response (IVR) system via API's, and Interactive Web Response.

5.3 Term: Provide for a contract commencing on the date of the award until project is complete. County will enter into annual maintenance contract with option of five (5) annual renewals.

5.4 Pre-Proposal: A pre-proposal conference will be conducted by Collin County on Tuesday, June 11th at 2:30 p.m. at 2100 Bloomdale, McKinney, TX 75071 in the Central

Jury Room. This is to provide an opportunity for all interested contractors to ask questions.

5.5 Funding: Funds for payment have been provided through the Collin County budget approved by the Commissioners' Court for this fiscal year only. State of Texas statutes prohibit the County from any obligation of public funds beyond the fiscal year for which a budget has been approved. Therefore, anticipated orders or other obligations that arise past the end of the current Collin County fiscal year shall be subject to budget approval.

5.6 Price Reduction: If during the life of the contract, the contractor's net prices to other customers under the same terms and conditions for items/services awarded herein are reduced below the contracted price, it is understood and agreed that the benefits of such reduction shall be extended to Collin County.

5.7 Delivery/Completion Time: Contractor shall place product(s) and/or complete services at the County's designated location in accordance with the proposal schedule, provided in the project plan. (See section-6.3)

5.8 Testing: Testing may be performed at the request of Collin County, by an agent so designated, without expense to Collin County.

5.9 Samples/Demos: When requested, samples/demos shall be furnished free of expense to Collin County.

5.10 PROPOSAL SCHEDULE

RFP released:	June 4, 2013
Pre-Proposal Conference:	June 11, 2013
Deadline for submission of contractor questions:	June 21, 2013
Proposals due:	June 27, 2013, 2:00 p.m.
Award of Contract:	September 2013
Effective date of contract:	Upon award

Collin County reserves the right to change the schedule of events as it deems necessary.

5.11 PURPOSE/SCOPE OF WORK

The County is requesting proposals from established contractors for a comprehensive Jury Management System and services to include an automated Jury Management System (JMS), interface with current Interactive Voice Response (IVR), and Interactive Web Response (IWR).

The successful offeror (Contractor) shall demonstrate a well-planned, integrated transition from any existing system, ensure that service disruptions are minimized, the County Jury staff (JMS users) are well trained and supported, and operational inconveniences are minimized.

In addition to an automated JMS, IVR interface, and IWR, the County may be interested in additional jury management technologies that will increase the efficiency or effectiveness of jury operations and/or enhance juror convenience. This includes kiosks, wireless scan guns, optical mark recognition scanners, and desktop scanners. Proposals shall include descriptions of additional technologies offered by the Contractor and a statement of what services or efficiencies those technologies would provide. Additionally, the County desires a Contractor with strong, well-established relationships with other counties in the State of Texas.

The County desires a system that is flexible and adapts to the changing needs and technologies of the jury selection process, including IVR functions and IWR functions. In addition, the County is interested in systems that would facilitate the transition from desktop applications to a web-based platform and use virtualization technology. The County requires an integrated implementation for the JMS, IVR interface, and IWR.

The County desires a turnkey installation of all systems specified in this RFP under a single contract.

5.12 **CONTRACTOR RESPONSIBILITIES** shall include, but are not necessarily limited to:

5.12.1 Designing, engineering, ordering, delivering, installing (with coordination and assistance from the County IT department, and IVR vendor for the API interface), testing, developing and inputting software databases.

5.12.2 Production, implementation, documenting and warranting all systems and applications proposed.

5.12.3 Performing all tasks necessary to develop and install all operating systems and user databases including data conversion from the existing system with coordination and assistance from the County IT department.

5.12.4 Meeting with all necessary user groups (Jury Services, IT, Auditors, court staff and IVR vendor) to gather the information necessary to complete all final station and application database designs for all systems and applications that may be a part of any contract resulting from this RFP.

5.12.5 Entering all system, user and application database(s) into the appropriate systems and testing them comprehensively with coordination and assistance from Collin County IT department, and IVR vendor.

5.12.6 Developing and conducting training programs specifically designed for the system being installed, including system administration, reporting, recordings, etc. fine-tuning application database(s) after the final phase of Production Implementation.

5.12.7 Providing customer service, help desk and disaster recovery services.

5.12.8 A primary contact on behalf of the Contractor shall be provided subject to the County's approval.

5.13 **JURY MANAGEMENT SYSTEM (JMS)**

Contractor's proposal shall clearly identify proven expertise to provide the following functionalities to meet the business needs of Collin County Jury Services through the implementation of an automated JMS, IVR interface, and IWR.

The JMS software shall provide an automated method to manage most functions of the jury process. Using bar code reader technology or other technology, the system shall automate to the greatest extent possible the management functions surrounding core areas of the Collin County Jury Services business processes.

Collin County's current system, ACS Juror Version 12.1 (M) supplies jurors to 21+ courts and operates one Central Jury Room. The proposed system shall be able to accommodate multiple courts located both in the County Courthouse and six Justice of the Peace locations. Summonses are sent to approximately 12,500 citizens each month.

The proposed JMS software solution shall be able to carry out the all the requirements set forth in Chapter 62 of the Texas Government Code as currently in place and be modifiable to meet any future requirements set forth by the Texas Legislature or the Texas Secretary of State.

Jury Wheel processing shall include random selection of prospective jurors, summons/questionnaire production, and processing requests.

Panel processing shall include random selection of panels for voir dire, tracking prospective jurors in and out of voir dire, and production of documentation for the Courts.

Attendance processing shall include juror attendance, generation of non-response and failure to appear documentation and fully auditable financial management/payroll processing including the generation of audit reports.

The system shall provide efficient, reliable service to handle approximately 12,500 summonses sent each month and accept simultaneous real-time updates from multiple locations using any number of work stations without significant performance degradation.

The JMS shall provide the functionalities listed in the Business/Technical Requirements in Attachment A.

JURY INTERACTIVE WEB RESPONSE (IWR) WEB BASED FUNCTIONALITIES

The Web based application shall provide jurors with services that are accessible 7 days a week, 24 hours a day. The system shall be required to successfully handle responses from approximately 12,500 summonses mailed each month. These services shall include verifying his/her jury service status, providing affidavit questionnaire information, obtaining information on juror fee payments and donations, and rescheduling his/her jury service. The application will integrate with the JMS to perform designated functions and provide the ability to produce management reports.

JURY INTERACTIVE VOICE RESPONSE (IVR) IVR SYSTEM FUNCTIONALITIES

The current IVR provides each juror with the details of his/her jury service, location, directions, a onetime reschedule with multiple dates to choose from. The on call provides each juror with dismissed or not, directions, and reschedule. All of this is based on the juror number. Each juror service (regular and on call) has its own API to the Jury Management. Contractor shall work with our current IVR vendor for API configuration and testing. The IVR and API's are configured as 2008R2, 64 bit with Enterprise SQL R2.

Phone System – Cisco CUCM 7.1
IVR – Cisco CCE 7.0 (2008R2, 64 bit)
ACD – Cisco CCE 7.0

5.13.1 Contractor shall provide equipment necessary to bring the IVR system online, if not capable with current IVR specific requirements.

INTERACTIVE MOBILE MESSAGING

Interactive Mobile Messaging functionalities can include prospective jurors using their smartphones to receive information from the JMS to find answers for common questions asked by prospective jurors. This feature could include the date and time they are required to report for service, location of the Collin County Courthouse, and interactive maps using GPS to navigate to the Courthouse. The Contractor proposal shall also include suggestions as to how a smartphone can be used to check-in while inside or outside of the Collin County Courthouse

SYSTEM INSTALLATION AND TESTING PLANS

5.13.2 Install, configure, test and make operational the contractor's system in the County/IT environment.

5.13.3 Provide system testing. This is a test for system operations, features, application integration, telephone set testing, etc.

5.13.4 For system acceptance testing, the contractor will provide a test plan to verify that the system has performed to functional requirements.

INTERACTIVE VOICE RESPONSE (IVR) SYSTEM API's AND TESTING PLANS

5.13.5 Upon completion of API design and configuration, the proposed IVR system testing shall include, but not be limited to, the following:

5.13.5.1 Test and work with current IVR vendor of all juror functions and features to ensure proper operation.

5.13.5.2 Tests of all juror options and responses to verify correct information.

5.13.5.3 Tests of all applications including proper integration with the system and one another.

5.13.5.4 Adjustment of all system components for optimal performance.

5.13.5.5 Provide benchmark testing as to the number of concurrent jurors accessing the system at the same time without adversely affecting the response time and system performance.

IMPLEMENTATION REQUIREMENTS

5.13.6 Supply a certified Project Manager who will work with the County for the duration of this project.

5.13.7 Be onsite for the week of Go-Live. The Contractor shall supply enough personnel to cover the multiple courts and Jury Rooms.

5.13.8 Responsible for installing and configuring the IWR system.

5.13.9 Train staff on routine maintenance of the IWR system – backup/restore procedures, installing of new releases, etc.

TRAINING REQUIREMENTS

5.13.10 Onsite system training shall be provided by the Contractor to the County personnel.

5.13.11 Onsite vendor training for kiosk use and maintenance shall be provided by the Contractor.

5.13.12 Provide a training plan and training to ensure that all users can adequately perform all basic system related administrative, diagnostic and proactive management functions within the proposed system.

5.13.13 Provide detailed system documentation that describes all system administration functions.

5.13.14 Provide the County's with six (7) hard copies each and one (1) electronic copy each of the User's Manual and the Systems Administration Guide.

5.14 MAINTENANCE/WARRANTY/SERVICE RESPONSE REQUIREMENTS

5.14.1 Warranty service shall include Contractor response to system problems in the following manner: Service shall include, when necessary, all service, parts and labor, necessary and be available twenty-four (24) hours per day, seven (7) days per week.

5.14.2 No charge will be made to the County for service calls outside Contractor's normal working hours and as necessary to meet the needs of the County.

5.14.3 Response to major failure maintenance calls shall not exceed two (2) hours. Major Failure maintenance shall be defined as follows:

5.14.3.1 The entire system is inoperative.

5.14.3.2 There are two or more system re-boots of the application server or database server in a twenty-four hour period.

5.14.3.3 Disruption in service to a single user of material nature. Material nature shall mean the County operations are critically affected.

5.14.4 Response to a minor failure shall not exceed the next business day following the report. Minor Failure shall be defined as follows: A request for service when a major failure does not exist shall be deemed to be a minor failure.

5.14.5 When a Minor Failure occurs, Contractor agrees to send qualified maintenance personnel, as required, to arrive at the affected County facility within twenty-four (24) clock hours of request, 8:00 A.M. to 5:00 P.M. Central Time, Monday through Friday, excluding weekends and County holidays.

5.14.6 If Contractor successfully corrects a Minor Failure within the required response period remotely, and no Contractor on-site presence is required to restore the system to proper performance levels, the 24-hour on-site response requirement shall be waived.

5.14.7 In the event of a hardware failure, response shall mean Contractor's technician is physically at the County location.

5.14.8 In the event of a software failure, response shall mean the Contractor's technician/support representative may remote to the servers to resolve the issue.

5.14.9 When a request for emergency service is received from the County, Contractor agrees to send qualified maintenance personnel, as required, to arrive at the affected County facility within two (2) hours of request, twenty-four (24) hours per day, seven (7) days per week. If Contractor successfully corrects a declared emergency condition within the 2-hour response period remotely and no Contractor on-site presence is required to restore the system's to proper performance levels, the 2-hour on-site response requirement shall be waived.

5.14.10 In the event of a system emergency, the Contractor shall: (i) prioritize County emergency; (ii) escalate within the Contractor's technical and management organizations as necessary to resolve the emergency; (iii) use its best efforts to correct the emergency within four (4) hours from receipt of notice of such emergency; and, (iv) maintain continuous work until the emergency is corrected. In the event that any emergency is not corrected by the Contractor within twelve (12) hours from receipt of notice, the successful Contractor shall replace that portion of the system causing such emergency with new items of equipment or software within twenty-four (24) hours from receipt of the emergency. Contractor will provide an escalation call list.

5.14.11 In the event the Contractor chooses to perform field repair on defective equipment and such repaired equipment continues to experience repeated failures adversely affecting the system, the Contractor shall, upon the County's agreement, replace such defective equipment rather than continuing to perform field repairs.

5.14.12 Should the condition require that Contractor re-boot the system or perform any action that could lead to a system re-boot or any other adverse condition, Contractor shall first notify the County's designated Project Manager and obtain permission before proceeding. This condition pertains to both remote and on-site conditions.

5.14.13 During the Warranty Period (which will begin upon Acceptance of the Work) in accordance with the Contract Terms and Conditions) and during any subsequent Contractor-provided maintenance period, Contractor may provide replacement of defective equipment/components with new equipment/components that is functionally and aesthetically equivalent to new. Such replacement equipment/components shall be of equal or greater performance characteristics, engineering/design levels, and appearance than replaced equipment/components.

5.14.14 Provide system updates at no charge to Collin County for the contract period.

5.14.15 Provide implementation support and ongoing Production Support including without limitation telephone support, remote access support or in-person support at the County's location(s) or such other locations as the County may specify or is necessary.

5.15 **HARDWARE REQUIREMENTS**

KIOSK REQUIREMENTS:

5.15.1 A minimum of two (or more) freestanding kiosks for use by prospective jurors with the below listed features.

5.15.2 Scanner capability to scan barcodes pre-printed on Juror Summons mailed to prospective jurors.

5.15.3 Touch-screen keyboard for manual check-in functions and check out functions.

5.15.4 Once a juror checks in, the kiosks shall have the capability to print a juror badge that the juror will use for the duration of his time at the Courthouse.

5.15.5 Ability to scan a driver's license in order to check-in. If multiple kiosks are part of the bid/solution, then one of the kiosks shall be wheelchair accessible for all kiosk functions.

5.15.6 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.

5.15.7 The Contractor proposal will recommend the optimum number of kiosks that shall be installed, along with the corresponding costs reflected in the contractors cost proposal.

SCANNER REQUIREMENTS:

5.15.8 Desktop Scanners (quantity of 4) to be used to scan in excuse letters, disqualification information, etc. to be attached to the Juror.

OMR - OPTICAL MARK RECOGNITION SCANNER REQUIREMENTS:

5.15.9 Minimum of one (1) bulk OMR scanner is required. Contractor shall also recommend additional scanners in their proposal based on the volume of questionnaires that shall be processed by Collin County.

HANDHELD WIRELESS SCAN GUNS WITH DISPLAY REQUIREMENTS:

5.15.10 Wireless Scan Guns with Display (quantity of 5) will be required for the clerks to process jurors.

5.15.11 Wireless scan guns shall provide the ability for bi-directional data feeds from the scan gun to the JMS software and back to the wireless scan gun display.

6.0 PROPOSAL FORMAT

- 6.1 The proposal shall, at a minimum, include a Table of Contents detailing sections and corresponding page numbers, and shall be printed on letter-size (8 1/2" x 11") paper and if submitting manually, assembled with spiral-type bindings or staples. **DO NOT USE METAL-RING HARD COVER BINDERS.**

Responsive proposals shall provide straightforward, concise information that satisfies the requirements of this solicitation. Responsive proposals will display conformity to the County instructions, requirements of this solicitation, and the completeness and clarity of content.

6.2 EXECUTIVE SUMMARY

The Contractor shall provide an Executive Summary of its proposal. The Executive Summary shall be a high-level, general overview of how the Contractor proposes to accomplish the requirements of this RFP. The Executive Summary shall demonstrate the Contractor's understanding of the basic requirements and expectations of the RFP.

6.2.1 FIRM OVERVIEW

The contractor is requested to define the overall structure of the Firm to include the following:

- 6.2.1.1 A descriptive background of your company's history.
- 6.2.1.2 State your principal business location and any other service locations.
- 6.2.1.3 What is your primary line of business?

6.2.1.4 How long have you been selling product(s) and/or providing service(s)?

6.2.1.5 State how many and the locations where your product/services are in use.

6.3 **PROJECT PLAN AND METHODOLOGY**

Contractor shall provide a response for each statement below.

6.3.1 Provide a specific, detailed project plan that describes how the Contractor intends to provide the requested services which are set forth in this RFP. Explain, in full detail, how the Contractor will meet all the needs of the County detailed in this RFP. If applicable, include items such as technical details and descriptions, key personnel, project plans, customer service, timetables, deliverables, ongoing communication with the County.

6.3.2 Provide a draft project plan (GANTT Chart) in MS project or other suitable format that describes the project level tasks, sub-tasks, duration, resources and appropriate dependencies.

6.3.3 Project plan shall include the following:

6.3.3.1 Performance testing, user acceptance testing time period and end to end testing on all services as well as an identification of number and quantity of the County/Collin County IT/Contractor resources to conduct the testing.

6.3.3.2 Roles and responsibilities of the Contractor and its representatives, including development, implementation, post-implementation, support and service level agreements for implementation issues both immediate and on-going.

6.3.3.3 Training resources, timeline and training program description (e.g. Train-the-trainer philosophy, training of 10 county personnel for 5 days including IT interfaces training, upgrade implementation/training, system administrator training, end-user knowledge transfer and reports training.)

6.3.3.4 An issues list and risk assessment.

6.3.3.5 Contractor onsite resources for thirty (30) days after implementation to assist County in troubleshooting. If Contractor is unable to remain onsite, Contractor to describe in his/her proposal the process/procedures and system requirements to provide trouble-shooting services. (e.g. VPN remote access under Collin County IT's VPN Policy)

6.3.3.6 A phased approach as well as complete system integration for the JMS, IVR and IWR.

6.4 **TECHNICAL REPSONSE**

Contractor shall include a response to each of the statements below.

6.4.1 Identify system capacity for the ability to work with current IVR system.

6.4.2 Outline system capacity, performance and application processing benchmarks.

6.4.3 Provide results of benchmark testing as to the number of concurrent jurors accessing the system at the same time without adversely affecting the response time and system performance for IVR and IWR.

6.4.4 Provide workflow diagrams of all system requirements, implementation plans and customer service procedures.

6.4.5 JMS capacity thresholds (min/max) for scalability and expansion.

6.4.6 Describe your SSL Protocol to provide security for Web traffic.

6.4.7 Identify the process to include customizations to the baseline jury system.

6.4.8 Describe solution to store images.

6.4.9 Provide a brief high level summary and diagram of the proposed system's architecture to include the JMS, the IVR API interface and the IWR system. Identify the concept approach behind the system architecture. Provide a high level description of the system design (including system and network topology) for the proposed system to account for all equipment, hardware, software and infrastructure components. Provide a schematic drawing showing relationship and configuration of software and hardware devices that may be included in a Technical Design Document. Provide database schema with data dictionary which may be included in Technical Design Document. Contractor shall provide stress testing data.

6.4.10 Describe the JMS system access and security control, including the types of access permitted to include user roles (i.e., support staff, management staff, and system administration staff). Sample activity logs of all user activities within the system.

6.4.11 Describe in detail your disaster recovery plan.

6.4.12 Provide sample system acceptance test plan.

6.4.13 Provide a sample checklist for system testing.

6.4.14 Provide detail on process for generating potential jurors and provide an algorithm for the random juror selection process.

6.4.15 Brochures and manuals providing technical specifications.

6.4.16 Provide clear and accurate photographs or drawings of all equipment cabinets (including internal layouts); If the literature, photographs or drawings differ in any manner from the systems and equipment being proposed, such differences shall be explained in detail.

6.4.17 Outline the hardware (e.g. optical mark recognition, wireless barcode readers, peripheral devices, etc.) and imaging software technologies to be used to capture and process the data.

6.4.18 Include any additional features or options that they provide which may be beneficial to the County.

6.4.19 Describe the proposed system's access and security control, including the types of access permitted to include user roles (i.e., support staff, management staff, and system administration staff).

6.5 STANDARDS FOR EQUIPMENT AND MATERIALS

6.5.1 All purchased equipment and materials shall be new, not used or refurbished. All equipment, components, materials and software provided shall be the latest models and versions and shall conform to current applicable industry standards. Defective or damaged equipment and materials shall be replaced or repaired, prior to final System Acceptance, in a manner that meets the approval of the County and at no additional cost.

6.5.2 Identify all barcode scanning equipment and/or other equipment and procedures necessary for juror check-in and check-out. Outline the hardware (e.g. scanner, barcode reader, peripheral devices, etc.) and imaging software technologies to be used to capture and process the data. State the types of scanners certified with the JMS software.

6.5.3 Provide specifications for the OMR (Optical Mark Recognition) Scanner that is being offered. List all OMR Scanners that are certified with the JMS software. Provide the rate per hour/minute for processing forms.

6.5.4 Describe in general terms how data conversion would be accomplished (e.g. mapping of the metadata from the current database schema to the new database schema, conversion of similar data with different sizing between the two databases, procedures to populate new database, etc.).

6.6 MAINTENANCE/WARRANTY/SERVICE

6.6.1 Indicate if your maintenance warranty program meets requirements in section 5.14. State any exceptions.

6.7 REPORTING TOOLS

Describe the common reports that are available to the County. Include the type of report, the information provided in the report, the frequency of the report, the process to request the report, and the process used to deliver the report. Contractors are encouraged to include a sampling of common reports. In addition, Contractor shall describe its capabilities to provide customization of reports (either by the County or Contractor) as may be required. This description shall include integrated reporting against all entry points.

6.8 RESPONSE TO BUSINESS REQUIREMENTS (FUNCTIONAL AND TECHNICAL)

Responses to the requirements listed in Attachment A of this RFP shall be provided in this section of the Contractor's proposal. Contractors are required to use the format provided and add explanatory details as necessary in the "Comments" column or in a separate spreadsheet that references the requirement number. Contractors shall identify the assumptions used to answer each specific business requirement using the "Assumptions" column in Attachment A. Additionally, Contractors shall indicate all software modules / sub-modules required to fulfill the business requirement in the "Modules / Sub-modules Required" column. Contractors shall fully answer each business requirement,

even if seemingly a duplicate requirement, as each requirement is given from a specific point of view. The following answer key should be used when responding to the requirements:

F = Fully Provided "Out-of-the-Box"	CU = Customization (requiring changes to delivered system) Unique to Collin County
CO = Configuration (no changes to source code) Settings Using System Screens	NV = Provided in the Very Next Version
R = Provided with Reporting Tool	NA = Not Available
	TP = Third Party Software Required

Note: Contractors shall use only one response code per requirement. Any requirement that is not answered utilizing a single code as outlined above will be treated as a negative/non-response. The selected Contractor shall warrant that the proposed solution will conform in all material respects to the requirements and specifications as stated in this RFP. That is, the detailed requirements as stated in this RFP will become part of the solution and implementation services contracts and agreements and will be warranted as such. **By virtue of submitting a response the Contractor agrees that the responses documented in Attachment A will become part of the contract documents.**

6.9 PRICING/FEES

The cost proposal shall include all costs related to implementing the detailed business requirements, found in Attachment A, in this RFP whether such implementation requires customization to the solution or not.

6.9.1 Contractor shall state pricing in the appropriate categories (refer to Attachment B, Jury Management Pricing Tables to provide your pricing):

6.9.1.1 Implementation Services:

- Data Conversion
- Training

6.9.1.2 Hardware Cost:

- Imaging Scanning System
- Barcode Handheld Wireless Scan Guns
- Desktop Scanners
- Kiosk

6.9.1.3 Software Cost:

- Jury Interactive Web Response (IWR)
- Jury Interactive Voice Response (IVR)

6.9.1.4 Optional Services:

- Print & Mail Services

**SIGNATURE FORM
COLLIN COUNTY, TEXAS**

DELIVERY WILL BE F.O.B. INSIDE DELIVERY AT COLLIN COUNTY DESIGNATED LOCATIONS AND ALL TRANSPORTATION CHARGES PAID BY THE SUPPLIER TO DESTINATION.

DELIVERY TO BE SPECIFIED IN CALENDAR DAYS FROM DATE OF ORDER.

WE **DO NOT** TAKE EXCEPTION TO THE BID SPECIFICATIONS.

WE **TAKE** EXCEPTION TO THE BID SPECIFICATIONS (EXPLAIN):

COMPANY INFORMATION/PROFILE/REFERENCES

Preferential Requirement: The County of Collin, as a governmental agency of the State of Texas, may not award a contract to a nonresident bidder unless the nonresident's bid is lower than the lowest bid submitted by a responsible Texas resident bidder by the same amount that a Texas resident bidder would be required to underbid a nonresident bidder to obtain a comparable contract in the state in which the nonresident's principal place of business is located (Government Code, Title 10, V.T.C.A., Chapter 2252, Subchapter A). Bidder shall make answer to the following questions by selecting the appropriate radio button or inserting information in the box provided:

Is your principal place of business in the State of Texas? Yes No

If the answer to question is "yes", no further information is necessary; if "no", please indicate:

in which state is your principal place of business is located:

if that state favors resident bidders (bidders in your state) by some dollar increment or percentage: Yes No

if "yes", what is that dollar increment or percentage?

Company Profile: IS YOUR FIRM?

- Sole Proprietorship Yes No
- General Partnership Yes No
- Limited Partnership Yes No
- Corporation Yes No
- Other Yes No

List Legal Names in Company:

List at least three (3) companies or governmental agencies where these same/like products/services, as stated herein, have been provided. Include company name, address, contact name and telephone number.

AS PERMITTED UNDER TITLE 8, CHAPTER 271, SUBCHAPTER F, SECTION 271.101 AND 271.102 V.T.C.A. AND TITLE 7, CHAPTER 791, SUBCHAPTER C, SECTION 791.025, V.T.C.A., OTHER LOCAL GOVERNMENTAL ENTITIES MAY WISH TO ALSO PARTICIPATE UNDER THE SAME TERMS AND CONDITIONS CONTAINED IN THIS CONTRACT. EACH ENTITY WISHING TO PARTICIPATE MUST ENTER INTO AN INTERLOCAL AGREEMENT WITH COLLIN COUNTY AND HAVE PRIOR AUTHORIZATION FROM VENDOR. IF SUCH PARTICIPATION IS AUTHORIZED, ALL PURCHASE ORDERS WILL BE ISSUED DIRECTLY FROM AND SHIPPED DIRECTLY TO THE LOCAL GOVERNMENTAL ENTITY REQUIRING SUPPLIES/SERVICES. COLLIN COUNTY SHALL NOT BE HELD RESPONSIBLE FOR ANY ORDERS PLACED, DELIVERIES MADE OR PAYMENT FOR SUPPLIES/SERVICES ORDERED BY THESE ENTITIES. EACH ENTITY RESERVES THE RIGHT TO DETERMINE THEIR PARTICIPATION IN THIS CONTRACT. WOULD BIDDER BE WILLING TO ALLOW OTHER LOCAL GOVERNMENTAL ENTITIES TO PARTICIPATE IN THIS CONTRACT, IF AWARDED, UNDER THE SAME TERMS AND CONDITIONS? Yes No

By signing and submitting this Bid/Proposal, Bidder/Offeror acknowledges, understands the specifications, any and all addenda, and agrees to the bid/proposal terms and conditions and can provide the minimum requirements stated herein. Bidder/Offeror acknowledges they have read the document in its entirety, visited the site, performed investigations and verifications as deemed necessary, is familiar with local conditions under which work is to be performed and will be responsible for any and all errors in Bid/Proposal submittal resulting from Bidder/Offeror's failure to do so. Bidder/Offeror acknowledges the prices submitted in this Bid/Proposal have been carefully reviewed and are submitted as correct and final. If Bid/Proposal is accepted, vendor further certifies and agrees to furnish any and all products/services upon which prices are extended at the price submitted, and upon conditions in the specifications of the Invitation for Bid/Request for Proposal.

THE UNDERSIGNED HEREBY CERTIFIES THE FOREGOING BID/PROPOSAL SUBMITTED BY THE COMPANY LISTED BELOW HEREINAFTER CALLED "BIDDER/OFFEROR" IS THE DULY AUTHORIZED AGENT OF SAID COMPANY AND THE PERSON SIGNING SAID BID/PROPOSAL HAS BEEN DULY AUTHORIZED TO EXECUTE SAME. BIDDER/OFFEROR AFFIRMS THAT THEY ARE DULY AUTHORIZED TO EXECUTE THIS CONTRACT; THIS COMPANY; CORPORATION, FIRM, PARTNERSHIP OR INDIVIDUAL HAS NOT PREPARED THIS BID/PROPOSAL IN COLLUSION WITH ANY OTHER BIDDER/OFFEROR OR OTHER PERSON OR PERSONS ENGAGED IN THE SAME LINE OF BUSINESS; AND THAT THE CONTENTS OF THIS BID/PROPOSAL AS TO PRICES, TERMS AND CONDITIONS OF SAID BID/PROPOSAL HAVE NOT BEEN COMMUNICATED BY THE UNDERSIGNED NOR BY ANY EMPLOYEE OR AGENT TO ANY OTHER PERSON ENGAGED IN THIS TYPE OF BUSINESS PRIOR TO THE OFFICIAL OPENING OF THIS BID/PROPOSAL.

Company Name	<input type="text"/>
Street Address of Principal Place of Business	<input type="text"/>
City, State, Zip	<input type="text"/>
Phone of Principal Place of Business	<input type="text"/>
Fax of Principal Place of Business	<input type="text"/>
E-mail Address of Representative	<input type="text"/>
Federal Identification Number	<input type="text"/>
Date	<input type="text"/>
Acknowledgement of Addenda	#1 € #2 € #3 € #4 € #5 € #6 €
Authorized Representative Name	<input type="text"/>
Authorized Representative Title	<input type="text"/>
Signature (Required for paper bid submission)	<input type="text"/>

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1.00	JURY MANAGEMENT SYSTEM REQUIREMENTS			
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.			

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1.09	Process and manage pre-service jurors.			
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.			

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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.			
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.			
2.00	JURY SUMMONS-POST SUMMONS FUNCTIONALITIES			
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 used.			

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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 the Jury Wheel to an existing pool.			
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 into the JMS system.			

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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 st) postal rate.			
2.06	Ability to provide export files (.txt, .xml, .csv, Excel, Word,.pdf and/or Access database).			
2.07	Capability for imaging, editing and 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	Record prospective jurors' service 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 added to the juror history.			

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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 notifications and provide an automated interface with bulk mailing processes.			

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2.11	Allow the system administrator to set the 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 record.			
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 generating summons.			
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	Using bar code technology, the ability to 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.			

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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, and created in real-time.			
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	Currently, summoned citizens shall 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 postponed, and number of times non-response or FTA.			

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2.21	The Contractor's proposal shall identify 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.			
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 authorized user who performed each transaction.			
2.24	Ability to archive, reactivate and delete entire pools as well as maintain juror history.			

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3.00	JUROR ATTENDANCE FUNCTIONALITIES			
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 daily attendances.			
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.			

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3.03	Provide functionality to assign jurors to 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.			
3.04	For each court location, the proposed 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 selected to serve on a panel.			

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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.			
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.			

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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 questionnaires.			
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.			

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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	CASE MANAGEMENT FUNCTIONALITIES			
4.01	Cases planned to start on given days 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 requested, date panel sent.			

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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	A list of all active trial courtrooms and 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	A history of each case: groups sent, jurors attending, number empanelled, date of sequestration, dates of deliberation, attributed to the case by day.			

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4.06	Shall provide for generating/printing a 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 capital murder voir dire.			
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 of 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	JURY SERVICE CALENDAR			

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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.			
6.00	JUROR ROOM PROCESSING			

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6.01	The system shall support automated juror check-in. Wireless scan gun or tablets devices shall ease the check-in process.			
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	The system shall support the ability to 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	Attendance reporting (summoned, 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.			

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6.11	When manually re-assigning a juror to another juror pool, the system shall timestamp the date/time of the transaction and record the user who completed the transaction.			
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.			

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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 to jury records.			
6.17	The system shall allow for the creation of an excusal letter.			
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.			

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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.			
6.24	The system shall automatically, permanently disqualify jurors who claim deceased, over 70 years of age, or non-resident after confirmation.			

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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	JURY WHEEL PROCESSING			
7.01	The new system will allow the Jury 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.			
7.03	Collin County's large population dictates that the proposed system's Jury Wheel process shall support more than 600,000 prospective jurors.			

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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.			
8.00	JURY PAYMENT/ACCOUNTING			
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.			
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.			

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8.04	An option to donate jury pay shall be 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-profit, and jurors name.			
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.			
8.07	Allow juror record payment adjustments. All adjustments shall be recorded in the juror's history.			

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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	Provide jury payroll reports that interface 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	Audit Logs / User Reports – the system 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).			

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8.26	Capability to automatically generate payment at the time of service for jurors, in order to reduce the cost of postage and envelopes.			
8.27	Juror Payroll Requirements – Automatic 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 OneSolution system.			
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.			
9.00	ARCHIVING REQUIREMENTS			
9.01	Ability to retrieve data from the previous Jury Wheel.			

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9.02	Long-term archival storage, as well as inquiry and reporting functions, of the prior Jury Wheel records shall be available as allowable under Chapter 62 of the Texas Government Code.			
10.00	CONVERSION/MIGRATION REQUIREMENTS			
10.01	Convert/migrate all data and information from the current eJuror system to the new system.			
11.00	REPORTING REQUIREMENTS			
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.			

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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.			
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).			

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11.11	The JMS should have reporting capabilities and data fields consistent with National Center for State Court performance measures for juries. http://www.courtools.org/~media/Microsofts/Files/CourTools/courtools_Trial_measure8_Effective_Use_Of_Jurors.ashx			
12.00	KIOSK FUNCTIONALITY/ INTEGRATION WITH JMS			
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.			

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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.			
13.00	SYSTEM ADMINISTRATION AND SECURITY			
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.			
13.02	Provide the ability for the system 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.			

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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.			
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.			

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	JURY INTERACTIVE WEB RESPONSE (IWR)			
14.00	WEB BASED FUNCTIONALITIES			
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	Require the juror to enter or modify 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	Provide the juror the option to submit 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	Capability to allow the juror to 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 set parameters within the JMS.			
14.07	Provide the juror with specific 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.			

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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.			

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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.			
	JURY INTERACTIVE VOICE RESPONSE (IVR)			
15.00	IVR SYSTEM FUNCTIONALITIES			

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15.01	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.			

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15.02	Provide for granting and confirming 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 business hours.			
15.03	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.			

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15.04	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 service.			
15.05	Provide jurors with payment information and inform when juror payment was generated and the amount of reimbursement including if any amount was donated.			
15.06	Allow a juror to request a verification letter of his/her jury attendances to provide to his/her employer or for his/her records.			
15.07	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.			

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15.08	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.			
15.09	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.			

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15.10	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.			
15.11	Ability to provide real time monitoring by authorized personnel on a standard desktop PC while operating other applications.			
15.12	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 efficiency of the system.			
15.13	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.			

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

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17.00	SPECIFIC REQUIREMENTS			
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.			

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1.00	TECHNICAL REQUIREMENTS			
1.01	Support at least 150,000 summonses per year.			
1.02	Support the option of TDD terminals.			
1.03	Support smartphone device and tablets.			
1.04	Provide System Redundancy built into the proposed system to account for hardware failure.			
1.05	Provide access to its features via API calls or web services.			
1.06	Support Internet Explorer 8.X, Google Chrome, Mozilla Firefox and Apple Safari web browsers.			
1.07	Provide security for web traffic with SSL Protocols acceptable to the Collin County IT Department standards.			
1.08	Provide the County with system administration tools to define and setup different security levels (e.g. inquiry, update, etc.) based on the user's job role.			
1.09	Operate in Windows XP and Windows 7 and all future versions of the Windows operating system for the life of the contract.			

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1.10	Certified to operate in a VMware environment.			
1.11	Provide for a software and hardware setup in a production environment as well as provide replicated development and testing and quality assurance environments that mirror the production environment.			
1.12	Provide a system capable of large scale data conversion from the County's current Jury system to the proposed system.			
1.13	Provide an optimal solution for scanning and capturing data from jury qualification questionnaires and summons.			
1.14	Support the storing of images in the County's Laserfiche architecture and environment, and shall have functionality available to allow users to directly access images from within the proposed JMS.			
1.15	Export data to external applications (.txt, .xml, .csv, Excel, Word, and .pdf formats).			

Technical Category: Jury Management System**Responses:****F** = Fully Provided "Out-of-the-Box"**R** = Provided with Reporting Tool**NV** = Provided in the Very Next Version**CU** = Customization (requiring changes to delivered system) Unique to Collin County**TP** = Third Party Software Required**NA** = Not Available**CO** = Configuration (no changes to source code) Settings Using System Screens

Reference Number	Technical Requirements	Response	Module Required to Fulfill Requirements	Assumptions/Comments
1.16	Provide canned standard reports as well as user-defined and generated customized, ad hoc reports using mainstream report generation software tools such as Crystal Reports.			
1.17	Provide development software tools that can be used to extract data from the database for reporting purposes.			
1.18	Provide the ability to allow the County's IT Department to write queries against the system's database to generate ad hoc reports without compromising system response time.			
1.19	Provide patch fixes and software upgrades at regular scheduled intervals (to be determined by the County and Contractor) at no cost to the County.			
1.20	Process jury records efficiently and accurately with acceptable response times determined by the County.			
1.21	Provide system availability and reliability 24 hours a day, 7 days a week, except for minimal scheduled down time for routine maintenance as recommended by the Contractor and agreed to by the The County.			

Technical Category: Jury Management System

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Reference Number	Technical Requirements	Response	Module Required to Fulfill Requirements	Assumptions/Comments
1.22	Provide an efficient, reliable system response time for processing jurors simultaneously using up to 7 workstations and with handheld scanning devices. The use of wireless handheld devices shall be included as an option.			
1.23	Allow the County to own and have unrestricted access to the data within the database including a complete set of object and source code and system documentation for the jury system subject to the County entering into a confidentiality agreement with the Contractor.			
1.24	Warrant that the software and other hardware provided by the Contractor will be compatible with and function on County supplied equipment and software, and operate with the County network configuration. The Contractor will be responsible for providing any additional hardware, software, or service necessary to provide the specified functionality.			

Technical Category: Jury Management System

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Reference Number	Technical Requirements	Response	Module Required to Fulfill Requirements	Assumptions/Comments
1.25	Provide the functionality to archive all juror records on demand for a user-specified period of time and allow historical access to archived records. The archive function will allow the users to select pools, juries, and other groups and delete part of the database, retaining only a predefined portion of the juror's history. The archive function will also allow the user to move specified juror records to other storage media.			
1.26	Provide the County with a comprehensive, final detailed system design configuration, including the JMS and all associated application systems prior to start of system installation and in accordance with an agreed upon delivery schedule for review and approval by the County.			
1.27	Contractor's proposal to provide an option to interface with Collin County's financial system (Sungard OneSolution).			
2.00	SYSTEM ADMINISTRATION			

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Reference Number	Technical Requirements	Response	Module Required to Fulfill Requirements	Assumptions/Comments
2.01	Provide backup procedures integrated with The County's IT Department present backup procedures and administered by County's designated database administrator. This procedure shall allow unattended, daily back-up of the database without bringing down the system database.			
2.02	Provide the ability to schedule summons, letters, and postcard printing beyond regular business hours.			
2.03	Provide authorized personnel the ability to monitor the system with real time data via system logs and real time displays.			
2.04	Identify the system administration terminal options via a desktop PC or via a terminal dedicated to the administration of the system.			
3.00	DATABASE ADMINISTRATION AND SECURITY			
3.01	Provide system functionality to define authorized user identifications and associated passwords to protect against unauthorized access to the database.			

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3.02	Provide the ability to administer Court users, limit his/her functional access corresponding to his/her assigned Court location and job description. Only those functions accessible to the Court user are to be displayed on the screen.			
3.03	Provide activity logs of all user activities within the system.			
4.00	CONTRACTOR RESPONSE TO SYSTEM PROBLEMS			
4.01	Provide for a fail-over process in case of a processor failure or natural disaster.			
4.02	Provide total system failure procedures identifying if system will be a self-contained re-boot or if it will require manual intervention.			
4.03	In the event of a system or database crash, provide database restore procedures for immediate recovery following the restoration or correction of a hardware or software failure.			
5.00	REPORTING TOOLS			

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Reference Number	Technical Requirements	Response	Module Required to Fulfill Requirements	Assumptions/Comments
5.01	Provide real time and historical reporting tools.			
5.02	Provide the capability for customized reports via report generating tools such as Crystal Reports. Provide the cost of Crystal report software that needs to be bundled with this response.			
5.03	Provide management information and reporting to allow the County to manage			
5.04	Provide management information and reporting to allow the County to manage			
5.05	Provide the County information about juror usage.			
5.06	Provide the Court information for budgeting purposes			
5.07	Assist the County in defending a jury challenge.			
5.08	Provide data to establish workload requirements that drive staffing needs and allocation.			
5.09	Provide data establishing historical experience regarding exemptions, excusing, postponing, etc.			

Technical Category: Jury Management System

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Reference Number	Technical Requirements	Response	Module Required to Fulfill Requirements	Assumptions/Comments
5.10	Provide data for performance and outcome measures, such as jury yields, days of service, etc.			

Total Cost Summary

Item Description	First Year Cost	Five Year Cost
Total Hardware Cost		
Total Software Cost		
Total Implementation Services Cost		
Total Print & Mail Services Cost (Optional)		
Additional Costs:		
1)		
2)		
3)		
4)		
5)		
Grand Total		

AFFIDAVIT OF COMPLIANCE

I, the undersigned, declare and affirm that my company is in compliance with the Immigration and Reform Act of 1986 and all employees are legally eligible to work in the United States of America.

I further understand and acknowledge that any non-compliance with the Immigration and Reform Act of 1986 at any time during the term of this contract will render the contract voidable.

Name of Company	<input type="text"/>
Title of Officer	<input type="text"/>
Name of Officer	<input type="text"/>
Date:	<input type="text"/>

FORM CIQ

CONFLICT OF INTEREST QUESTIONNAIRE

Page 2

For vendor or other person doing business with local governmental entity

**5 Name of local government officer with whom filer has affiliation or business relationship.
(Complete this section only if the answer to A, B, or C is YES.)**

This section, item 5 including subparts A, B, C & D, must be completed for each officer with whom the filer has affiliation or other relationship. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income from the filer of the questionnaire? Yes No

B. Is the filer of the questionnaire receiving or likely to receive taxable income from or at the direction of the local government officer named in this section AND the taxable income is not from the local governmental entity? Yes No

C. Is the filer of this questionnaire affiliated with a corporation or other business entity that the local government officer serves as an officer or director, or holds an ownership of 10 percent or more? Yes No

D. Describe each affiliation or business relationship.

6

Signature of person doing business with the governmental entity

Date

Adopted 11/02/2005

Form **W-9**
(Rev. January 2011)
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

**Give Form to the
requester. Do not
send to the IRS.**

Print or type See Specific Instructions on page 2.	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification (required): <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶	
	<input type="checkbox"/> Other (see instructions) ▶	
Address (number, street, and apt. or suite no.)		Requester's name and address (optional)
City, state, and ZIP code		
List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number									
				-			-		

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Employer identification number									
				-					

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here	Signature of U.S. person ▶	Date ▶
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

In order to better serve our bidders, the Collin County Purchasing Department is conducting the following survey. We appreciate your time and effort expended to submit your bid. Please take a moment to complete the below. Should you have any questions or require more information please call (972) 548-4165.

HOW DID YOU RECEIVE NOTICE OF THIS REQUEST FOR BID OR PROPOSALS?

McKinney Courier-Gazette?	€	Yes	€	No
Plan Room?	€	Yes	€	No
Collin County Web-Site?	€	Yes	€	No
Facsimile or email from BidSync?	€	Yes	€	No
Other <input type="text"/>				

HOW DID YOU RECEIVE THE BID DOCUMENTS?

Downloaded from Home Computer?	€	Yes	€	No
Downloaded from Company Computer?	€	Yes	€	No
Requested a Copy from Collin County?	€	Yes	€	No
Other <input type="text"/>				

Thank You,

Collin County Purchasing Department

Question and Answers for Bid #2013-179 - Jury Management System

OVERALL BID QUESTIONS

There are no questions associated with this bid. If you would like to submit a question, please click on the "Create New Question" button below.