**EXHIBIT A: STATEMENT OF WORK**

## JURY MANAGEMENT SYSTEM

* 1. The Contractor’s Jury Management System (JMS) software will automate to the greatest extent possible the Court jury functions and processes. The JMS will include the ability to produce the following:
     1. Pool Processing
        1. A random selection of prospective juror pools.
        2. Summons/questionnaires.
        3. Form subgroups consisting of a randomly selected sample of prospective jurors based on their questionnaire responses.
     2. Panel Processing
        1. A random selection of panels for tracking prospective jurors in and out of voir dire, production of “in court” documentation, and jury empanelment.
        2. Attendance Processing.
        3. Juror attendance, generation of failure to appear documentation, and fully auditable financial management/payment processing, including the generation of audit reports.
        4. Functionality for both jurors and staff to generate a verification of service document.
  2. The system will provide efficient, reliable service to handle approximately 78,000 processing requests each month and accept simultaneous real-time updates from multiple locations, using any number of workstations, without significant performance degradation. The system must be able to, on average, process attendances simultaneously from six (6) court locations at a rate sufficient to record the attendance of 600 jurors arriving within a 45-minute time period.
  3. The JMS will include the ability to:
     1. Support electronic notifications to prospective jurors, empaneled jurors and jurors in a trial.
     2. Create user defined messages for JMS that supports Short Message Service (SMS) messages.
     3. Send different messages to juror’s cell phone number depending on their juror status, i.e., summoned, needs to report or excused, etc.
     4. Embed data in the message that is specific to each juror.
     5. Send individual texts or a mass text to a group, pool or case.
     6. Allow jurors to sign up for SMS notifications via the web and be able to opt-out through some mechanism.
     7. Provide configuration to adapt to Jury business practices.
     8. Process juror source lists. See “Master Pool” for data sources (See 2.1.2 for reference).
     9. Process groups of jurors.
     10. Automate the check-in of the jurors in the Courtrooms.
     11. Produce Summons.
     12. Maintain juror information including but not limited to: Juror ID, first name, middle initial, last name, DOB, phone, address, email, waiver option, comments section, court location, data source, group number, appearance date, and status.
     13. Display and maintain a complete juror history.
     14. Process and manage pre-service jurors (See 2.1.8 for reference).
     15. Record in-service jurors.
     16. Record basic Case information and form jury panels.
     17. Compute and maintain case juror costs.
     18. Capture juror related statistics.
         1. The system must be capable of capturing juror-related statistics both for individual locations and for the overall system. The required statistics are detailed in the attached reports. See examples in Appendix B.
     19. Produce notices or letters – ability to print to Court printers and export file to send to 3rd party vendors.
     20. Produce jury management reports.
     21. Provide reporting capabilities and Excel export for payment processing.
     22. Support all industry standard browsers and commonly used mobile browsers.
     23. Must provide data conversion from existing system into the Contractor’s JMS.
     24. Provide Court with system administration capabilities.
     25. Automate the Department of Motor Vehicles (DMV), County Registrar of Voters (ROV) and Franchise Tax Board (FTB) updates bi-annually at no cost.
     26. Calculate juror’s traveled mileage reimbursement using juror’s mileage actually traveled in attending and returning from court pursuant to California Code, Code of Civil Procedure (CCP) 215 (c).
     27. Indicate/track when a trial lasts thirty (30) days (configurable) or more and automatically send IRS Form 1099.
     28. Ability to perform batch actions. Including but not limited to, bulk excusals, deferments.

## JURY SUMMONS REQUIREMENTS

* 1. The Contractor’s system will:
     1. Support a one-trial/one-day term of service and a one-step summons/affidavit mail-out. The system will provide the flexibility to use any other term of service by providing the ability for Court users to specify the next date of required service on a daily basis.
     2. Assign a unique number to identify each record housed in the aggregated file from DMV, ROV, FTB (“Master Pool”), which will be used throughout the system. This number is referred to as the “Juror ID Number”. The system will also provide the ability to search for individual records by the Juror ID Number, Juror Badge Number or Juror Name.
     3. Randomly select potential jurors, for summonsing individually or in Court user-defined groups, from the Master Pool. This process will include the ability to select potential jurors automatically from specified zip code areas.
     4. Export pools and queries to different data formats (i.e., .csv, .pdf, .xlsx, .docx, etc.), enabling the automatic selection of potential jurors from specified zip code areas.
     5. Have the Master Pool include the fields in this file and their placement order will be set up to provide interface with the Court’s outside mail vendor. The system will allow staff to manually add any individual record in the Master Pool to an existing pool.
     6. Provide the capability for online juror questionnaires. This information includes, but will not be limited to, address, occupation information, telephone numbers and check-box information. The Contractor will assist the Court in developing the questionnaire forms and will develop the system to incorporate the information into the juror database. The Court’s desire is to go paperless wherever possible.
     7. Record prospective jurors’ service term availability from juror responses on their affidavits. The system will incorporate the time qualification information in the juror’s voir dire or biographical data, which can be used to electronically select time qualified panels to be sent to courtrooms. The system will make a random selection of a Court user-specified number of pool members, based on specific terms of availability, for assignment to a time-qualified panel.
     8. Have functions for a Court user to review and change a summoned juror record.
        1. Where the participant is to be excused, disqualified, transferred or deferred, the Court user will be able to specify a reason for the excuse, disqualification, transfer or deferral. The reason, date, and authorized Court user who granted the excuse, disqualification, transfer or deferral must be automatically added to the juror history.
        2. In the case of a jury service deferral, the Court user should be able to select a date from available dates within an administratively defined range.
        3. All juror transactions that involve excusing, disqualifying, transferring, deferring or re-summonsing will allow the Court user the option to automatically generate a confirmation notice to the prospective juror by selecting a method of notification (e.g. telephone, email, SMS and postcard). The system will have the ability to create download files used to generate mailed notifications and provide an automated interface for an outside mail vendor.
     9. Ensure that deferred jurors, at the time a new jury pool is created, are selected before additional prospective jurors are randomly selected from the Master Jury Pool. Jurors deferred from one summons period to the next will be automatically included in the output file for generating summons.
     10. Support a call-in procedure to allow staff to specify the number of reporting versus call-in jurors summoned on a given day.
     11. 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.
     12. Maintain in the juror’s record the juror’s first and last name separately, suffix designations, address, status, government employee indicator, court assignment, voir dire information, mileage, report date(s), deferments, juror ID number, employer information, telephone numbers (home, work, cell), payment or fee waiver information, failure to appears, 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, room number, check-in and check-out times, deferral date, a free form notes entry scroll box, number of attendances, number of times deferred, and number of times failure to appear (FTA).
     13. The Contractor will collect juror email addresses and cell phone number to allow for electronic notifications.
     14. The Contractor will have the ability to allow Court users to develop and issue juror surveys and exit questionnaires by electronic method.
     15. Track and automatically record each step of the juror’s service history beginning with summonsing through payment. The history will continue through their lifetime and be accessible by the person’s pool number, name, status, report date, or juror ID number. The history will also reflect if the person was disqualified, excused, transferred or deferred, and the reason why. All historical documentation will include the authorized Court user who performed each transaction.
     16. Have the ability to archive, reactivate and modify entire pools, as well as maintain juror history.
     17. Allow the juror to waive per diem fees, mileage reimbursement, or both.
     18. Ability to review and validate exported files prior to submission for processing.

## JUROR ATTENDANCE REQUIREMENTS

* 1. The JMS must support the following functions:
     1. Track the juror from the time of summons through completion of their jury service.
     2. Provide for processing attendance information from scanned badges when a prospective juror arrives by posting date and time information in their attendance record. The system will 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, the system will allow the Court user to add the juror to the pool. The system must be able to accept information simultaneously from six (6) court locations at a rate sufficient to record all daily attendances.
     3. Provide for printing a bar code badge or summons form for a juror who fails to bring in their badge.
     4. Provide functionality to assign jurors to panels of any size (up to 500) either by a process of random selection or by group and track the panel members to and from the courtroom. Assignments may be subject to conditions such as time-availability. Conditional assignments will be drawn from lists provided by the system, based on affidavit information and be managed by jury staff.
     5. For each court location, the system will 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 assembly 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 assembly room that have not yet been selected to serve on at least one panel for voir dire.
     6. 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 must be able to identify the number of jurors available to report. Additionally, the system must allow individuals to be moved from On-Call to reporting status and interface with an Interactive Voice Response (IVR) and/or Interactive Web Response (IWR) systems to notify participants of their jury status by telephone, email or text messaging.
     7. Provide for reassigning an On-Call group or an individual to another court location.
     8. Provide for returning a juror to the pool or completing their service when they return from a courtroom by scanning the juror ID on their summons. The system must allow staff to dismiss jurors by groups or individually from the pool to complete their service.
     9. Provide tracking capabilities based on time intervals or cumulative milestones. For instance, a specific action should be triggered at ninety (90) days, followed by the next action at one-hundred eighty (180) days.
     10. 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 deferred jurors attempting to report, or for jurors who did not return affidavits. The system must be capable of identifying and providing both audible and visual notifications if an action deviates from established processes. Generally, the system should allow the flexibility to change characteristics of a prospective juror’s record to accommodate scheduling issues.
     11. Provide the ability to print a verification letter of jury attendance for the juror to provide to their employer, or for their records.
     12. Provide for updating or correcting a person’s name and address and automatically update mileage and geographical information. This updated information will be recorded in the juror’s history record indicating previous name or address information.

## CASE MANAGEMENT REQUIREMENTS

* 1. The JMS will provide for Jury Administration Staff the ability to enter, access, update and store the following information:
     1. 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 will include, case type, case number, description, number of report copies, charge type, Judge’s name, courtroom, jurisdiction, start date, duration, reason, jurors requested, date panel sent, juror payment status.
     2. As the case proceeds, update the start and end dates and juror dispositions including seated, alternate, stipulated, cause, deferred, absent, peremptorily challenged (prosecution or defense, plaintiff or defendant), not reached and sworn.
     3. A list of all active trial courtrooms and the status of activities (voir dire, panels presently in courtrooms, trail start and end dates).
     4. Status of civil reimbursement and indicate cases that require civil reimbursement records, including the ability to calculate and record civil transactions.
     5. The ability to generate a civil collections report on a daily basis to be used to reconcile collections information indicating the amount of fees and mileage for all jurors in attendance regardless of fee waiver options. The report must display each juror by name with the amount of fees, mileage and fee waiver (yes/no). The contractor will include a sample report demonstrating this requirement called a “Civil Collections” report.
     6. Daily attendance of jurors assigned to a case, with check-in ability from the Courtroom.
     7. A history of each case: groups sent, jurors attending, number empaneled, judgment amount, dates of deliberation, fees and mileage costs attributed to the case daily.
     8. Provide for generating/printing reports and data entry sheets for courtrooms to use during the jury selection process. The forms must be viewable, accept online entries, and be printable. The initial panel reports will include an alphabetical list (attorney’s list), random list for selection (judge’s list), voir dire list and allow Court user the ability 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 must also provide for alternate jurors.
     9. 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. Provide the ability to override the juror assignment based on access security level.
     10. 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 their service). Ability to track changes for auditing purposes based on access security level.
     11. Prevent jurors from being assigned to more than one case at a time.
     12. Any mandated legislative changes enacted during the project should be included in the scope of work and be treated as a priority.
     13. Any legislative changes enacted after the project is concluded should be treated as enhancements and delivered in alignment with the legislation

## JUROR PAYMENT / ACCOUNTING REQUIREMENTS

* 1. The JMS will:
     1. Contain all accounting fields required by the Court to perform jury payment functions. The accounting string and field elements are identified in Appendix A
     2. Contain data tables configurable by the Court for per diem rates and mileage reimbursement rates by actual Juror’s zip code.
     3. Be configurable to apply Court business rules for juror fees and mileage payments (current Court policy is that jurors do not receive fees or mileage payments for the first day of jury service; however, business rules can change).
     4. Allow juror record payment adjustments for fees and mileage by authorized staff, based on roles or profiles assigned to Court employees. All adjustments must be recorded in the juror’s history.
     5. 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 will also ensure that jurors cannot receive duplicate payments for any given payment date.
     6. Include all jury payment components required by the Court, including the creation of a Jury Payment Extract file. This file will be in conformance with existing Court formatting and layout requirements for interfacing into the State’s financial system, Phoenix/SAP.
     7. Have the Jury Payment Extract feature that will include the ability to run both regular and supplemental payments, which can be run based on a specific date or date range, by case number designated by Court staff.
     8. Support supplemental payment runs. These may require the ability to make payment adjustments or requests, which would be added to a juror’s history as part of an audit trail.
     9. Provide jury payment reports that interface with the Jury Extract File for reconciliation. The reports should be in a format accepted by the Court and may be configurable/customizable by the Court. They should also be exportable in Court specified formats (e.g. Word, Text, Excel, .CSV, and PDF) and can be saved on a local or network drive. The reports must reflect the correct amounts per Court business rules for Juror Payments. For example, current Court policy is that jurors do not receive fees or mileage payments for the first day of jury service, only for the second day and forward.
  2. The system will produce the following reports:
     1. Summary Report – summarizes jury payment separated by Case Type/Fund, and then Fees and Mileage. This report should be configurable to accept any range of payment dates. It should also validate the Jury Payment Extract file generated at any given time.
     2. Detailed Report – reflects each juror’s payment record, by Fees and Mileage payments. This report should be configurable to accept any range of payment dates. It should also validate any Jury Payment Extract file generated at any given time.
     3. Supplemental Payment Report – reflects supplemental payments made to jurors based on fees/mileage adjustments, or payment of fees/mileage previously waived by juror. This report should be configurable to accept any range of payment dates. It should also validate any Supplemental Jury Payment Extract file generated for any given time period.
     4. Audit Logs / User Reports – the system will generate a log or audit report reflecting all Court users of the system who conduct payment activities in the JMS. The report should 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 should also be included.
     5. IRS Form 1099 Fees Limit Report - the system will be configurable, based on a given date range, for any juror paid fees (excluding mileage) over the IRS established limit for any given year. Although the limit is currently $600, this limit should be configurable by the Court.
     6. 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 should contain all information stored in the JMS for a juror to meet IRS Form 1099 reporting requirements, including but not limited to name, address, city, state, zip code and total amount paid in juror fees (excluding mileage).
     7. Capable of generating additional reports that may be required by the Court.
  3. The system will allow all reports and logs to be exported to standard file formats (.pdf, .txt, .csv, .xls, .xlsx, .docx) or printed to local and network printers.

## SYSTEM ADMINISTRATION & SECURITY

* 1. The system will provide the ability to:
     1. Review and modify tables based on Court locations which may impact juror pay parameters.
     2. Have system administrator to set the parameters to include, but not be limited to, FTA deferrals, deferral guidelines, re- summonsing exemption period, per diem amount and mileage amount.
     3. Review and modify system maintenance tables.
     4. Establish various levels of security groups (profiles) to accommodate the Court’s unique operational requirements. Additionally, user account creation and security roles will need to be set by Court technical support personnel.
     5. Support an audit feature for tracking Court user activity.
     6. Support backup procedures integrated with the Court‘s present backup procedures and administered by Court‘s designated database administrator. This procedure will allow unattended, daily back-up of the database without bringing down the system database.
     7. Schedule summons and postcard printing beyond regular business hours.
     8. Allow Court authorized personnel with the ability to monitor the system with real time data via system logs and real time displays.

## GENERAL SYSTEM REQUIREMENTS

* 1. Support at least 1,000,000 summonses per year. **(Offeror to propose)** the JMS capacity thresholds (min/max) for scalability and expansion).
  2. Support the option of Telecommunications Device for the Deaf (TDD) terminals.
  3. Support mobile devices, smart phones, tablets, etc.
  4. Provide access to its features via Application Programming Interface (API) calls or web services.
  5. Allow trial information updates from a Structured Query Language (SQL) script, or stored procedure, etc.
  6. Support all major Internet browsers which include, but not limited to Microsoft Edge, Google Chrome, Mozilla Firefox, and Apple Safari web browsers.
  7. Provide security for web traffic with Secure Sockets Layer (SSL) Protocols acceptable to the Court.
  8. Must include the ability to allow jurors to check in with their mobile phones, both Android and iPhone within a specified distance from the physical courthouse.
  9. Ability to host the application from an Azure or Amazon Web Service (AWS) cloud environment.
  10. Must be able to integrate with the Tyler Odyssey Case Management System using the Odyssey integration Toolkit
  11. Desktop solutions must operate in Windows 7, 8, 10, 11 and newer releases as they become available.
  12. Server(s) operating system solution must be a Windows Server environment using Windows 2019 or higher version.
  13. Database solution must use SQL 2019 or higher version.
  14. All server applications must be certified to use VMWare 6.7 server virtualization or higher.
  15. All systems must be IP4/6 capable.
  16. The vendor must provide business workflow of all proposed processes and enhancements.
  17. Provide a software and hardware setup in a production environment, as well as provide replicated/mirrored development and staging/testing environment.
  18. Provide a system capable of large-scale data conversions from the Court’s current system to the proposed system; describe in general terms how this will be accomplished (e.g. mapping of the metadata from the current Judicial Systems).
  19. Provide an internal paperless optimal solution using the Court’s Document Management System. All scanned documents should be categorized and indexed automatically using advanced scanning processes.
  20. Export data to external applications (.txt, .xml, .csv, Excel, Word, .pdf).
  21. Provide “canned reports” as well as Court user-defined and generated customized ad hoc reports, using mainstream report generating software tools, such as Crystal Reports and SQL Server Reporting Services.
  22. Provide the ability to allow the Court to write queries against the system’s database to generate ad hoc reports, without compromising system response time.
  23. Provide patch fixes and software upgrades at regularly scheduled intervals (to be determined by the Court and Contractor), at no cost to the Court.
  24. Provide system availability and reliability twenty-four (24) hours a day, seven (7) days a week, except for minimally scheduled down time for routine maintenance, as recommended by the Contractor and agreed to by the Court.
  25. Ensure an efficient, reliable system response time that meets Court-approved standards across multiple court locations. The system must support up to 250 workstations concurrently, if necessary, to process jurors simultaneously.
  26. Allow the Court 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 Court entering into a confidentiality agreement with the Contractor.
  27. Provide the functionality to archive all juror records on demand for a Court user-specified period of time and allow historical access to archived records. The archive function will allow the Court 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 Court user to move specified juror records to cloud storage or other storage media.
  28. Provide the Court with a comprehensive, final detailed system design configuration, including the proposed solutions, prior to the start of system installation, and in accordance with an agreed upon delivery schedule for review and approval by the Court.
  29. Ability to schedule system generated batch actions for mass updates.

## SYSTEM ADMINISTRATION TRAINING

* 1. Deliver a comprehensive ongoing training plan and initial training within 60 days of contract execution to ensure that Court‘s system support and operations staff can adequately perform all basic system-related administrative, diagnostic and proactive management functions within the system. Continue to provide training as needed.
  2. Provide detailed system documentation that describes all system administration functions.
  3. Provide the Court with an electronic copy of each of the User‘s Manual and the Systems Administration Guide.

## DATABASE ADMINSTRATION & SECURITY

* 1. Provide system functionality to define authorized Court user identifications and associated passwords to protect against unauthorized access to the database.
  2. Contractor’s system access and security control, including the types of access permitted to include Court user roles (i.e., support staff, management staff, and system administration staff) are (Offeror to propose).
  3. Provide the ability to administer Court users, limit their functional access corresponding to their assigned Court location and job description. Only those functions accessible to the Court user are to be displayed on the screen.
  4. Provide activity logs of all Court user activities within the system.
  5. Provide data dictionaries within 60 days of contract execution.

## SERVICE RESPONSE TO SYSTEM PROBLEMS

* 1. Provide implementation support and ongoing Production support, including without limitation telephone support, remote access support, or in-person support at the Court’s location(s).
  2. Provide documentation and instructions for recovering from a system crash or data corruption.
  3. In the event of a system or database crash, provide database restoring procedures for immediate recovery following the restoration or correction of a hardware or software failure.

## WARRANTY SERVICE RESPONSE TO SYSTEM PROBLEMS

* 1. Warranty service will include Contractor response to system problems in the following manner:
     1. Technical support service will be available twenty-four (24) hours per day, seven (7) days per week.

## SERVICE RESPONSE TIME & REQUIREMENTS

* 1. Response to major failure maintenance calls will not exceed two (2) hours. Major Failure maintenance will be defined as follows:
     1. The entire system is inoperative.
     2. There are two (2) or more system re-boots of the application server or database server in a twenty-four-hour period.
     3. Disruption in service to a single user of a material nature. Material nature will mean the Court’s operations are critically affected.
  2. Response to a minor failure will not exceed the next business day following the report. Minor Failure will be defined as follows:
     1. A request for service when a major failure does not exist will be deemed to be a minor failure.
        1. When a minor failure occurs, Contractor agrees to send qualified maintenance personnel, as required, to arrive at the affected Court facility within twenty-four (24) clock hours of request, 8:00 A.M. to 5:00 P.M. Pacific Standard Time, Monday through Friday, excluding weekends and Court holidays.
        2. 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 will be waived.
  3. In the event of a hardware failure, response will mean the Contractor’s technician is physically at the Court’s location to resolve the issue.
  4. In the event of a software failure, response will mean the Contractor’s technician/support representative may connect remotely to the servers to resolve the issue.
  5. When a request for emergency service is received from the Court, Contractor agrees to send qualified maintenance personnel, as required, to arrive at the affected Court facility within two (2) hours of request, twenty-four (24) hours per day, and 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 systems to proper performance levels, the 2-hour on-site response requirement will be waived.
  6. In the event of a system emergency, the Contractor will: (i) prioritize Court’s 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 to Court’s satisfaction. If any emergency is not corrected by the Contractor within twelve (12) hours from receipt of notice, the Contractor will 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 as a part of the SLA support agreement.
  7. In the event the Contractor chooses to perform field repairs on defective equipment and such repaired equipment continues to experience repeated failures adversely affecting the system, the Contractor will, upon Court’s agreement, replace such defective equipment, rather than continuing to perform field repairs.
  8. 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 will first notify Court IT Management and obtain permission before proceeding. This condition pertains to both “remote” and “on-site” conditions.

## REPORTING TOOL REQUIREMENTS

* 1. Contractor will provide the canned reports that are available to the Court. This description will 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.
  2. Provide real time and historical reporting tools.
  3. Provide the capability for customized reports via report generating tools, such as Crystal Reports, and SQL Server Report Services.
  4. Contain standard reports to:
     1. Estimate juror needs from source lists
     2. Estimate juror needs on a quarterly, monthly, weekly, and daily basis
     3. Provide the Court information regarding juror usage
     4. Provide the Court with information regarding panel usage (report to include: juror selected, juror excused including reason)
     5. Provide a report that provides an audit trail for user activity
     6. Provide the Court information for budgeting purposes
     7. Assist the Court in defending a jury challenge
     8. Provide data to establish workload requirements that drive staffing needs and allocation
     9. Provide report on questionnaires submitted
     10. Provide data establishing historical experience regarding exemptions, excusing, postponing, deferring, etc.
     11. Provide data for performance and outcome measures, such as jury yields, days of service, etc.
  5. Contractor will provide a list and samples of all reports, including the Annual Jury Survey report required by the California Judicial Council.

## ADDING AND RECONCILING EXISTING JUROR RECORDS

* 1. The system must provide a procedure for importing data to add juror information and reconcile against existing juror records. Annually we receive prospective juror information from:
     1. The Department of Motor Vehicles (most reliable)
     2. The state registrar of voters
     3. The Franchise Tax Board (least reliable)
  2. The import procedure shall support, at a minimum, the ability to find, update and document the source from each annual iteration while maintaining a history on each juror ID.

## INTERACTIVE VOICE RESPONSE (IVR) & WEB RESPONSE (IWR) REQUIREMENTS

* 1. The system must provide an API (for jurors to call in on Voice Over IP (VOIP) system and check on Juror status prior to check in. API needs to be securable via IP address (to the IVR vendor accessing it, if subcontracted and use at least two (2) pieces of information (configurable) to verify caller.
  2. The API should also have procedures to request postponing jury service.
  3. A website needs to be created to allow Jurors to access their juror data upon providing at least but not limited to two (2) pieces of information to:
     1. Check on juror status
     2. Complete a configurable juror questionnaire
     3. Update their information (name, address, phone and email)
     4. Retrieve a juror verification form to provide to their employer
     5. Ability for jurors to request postponements, request excusals and disqualifications

## SYSTEM INSTALLATION & TESTING PLANS

* 1. Licensing must provide for separate test and production systems. The test system will be used to verify all operational procedures can be performed; reports generated. The test system should run on a different virtual machine for the purpose of patch testing, verify updates and upgrades prior to production deployment and backup testing.

## DELIVERABLES

* 1. Phase 1: Requirements Gathering and Planning
     1. Requirements Specification Document:
        1. A comprehensive document detailing all functional and non-functional requirements of the new jury system.
        2. Includes user stories, use cases, and detailed descriptions of system features.
        3. Covers areas such as juror selection, notification, attendance tracking, and courtroom management.
     2. Project Plan:
        1. A detailed project plan outlining timeline, milestones, resource allocation, and risk management strategies.
        2. Includes a Gantt chart, project schedule, and communication plan.
        3. Defines roles and responsibilities of project team members.
     3. System Architecture Design:
        1. A high-level and detailed architectural design of the jury system, including hardware and software components.
        2. Includes database schema, network diagrams, and system flowcharts.
        3. Describes security protocols, and data protection measures.
  2. Phase 2: Development and Testing
     1. Prototype/Minimum Viable Product (MVP):
        1. A working prototype or MVP demonstrating core functionalities of the jury system.
        2. Used for user feedback and iterative development.
     2. Unit Test Results:
        1. Documentation of unit testing performed on each module, demonstrating adherence to quality standards.
        2. Includes test cases, test data, and test results.
     3. Integration Test Results:
        1. Documentation of integration testing performed to ensure seamless interaction between system modules.
        2. Documentation of the results of testing the system with existing court systems.
     4. User Acceptance Testing (UAT) Plan and Results:
        1. A plan for UAT, including test scenarios and acceptance criteria.
        2. Documentation of UAT results, including user feedback and identified issues.
  3. Phase 3: Implementation and Deployment
     1. Deployment Plan:
        1. A detailed plan for deploying the jury system in the production environment.
        2. Includes deployment procedures, rollback plans, and post-deployment support strategies.
     2. Training Materials:
        1. User manuals, training guides, and online tutorials for system administrators and end-users.
        2. Training sessions for staff.
     3. System Deployment Report:
        1. A report documenting the successful deployment of the jury system.
        2. Includes deployment logs, configuration details, and performance metrics.
     4. Post-Implementation Support Plan:
        1. A plan detailing ongoing support, maintenance, and bug fixes.
        2. Service level agreements.
  4. Phase 4: Documentation and Closure
     1. System Documentation:
        1. Comprehensive documentation of the jury system, including user manuals, technical specifications, and maintenance guides.
     2. Project Closure Report:
        1. A final report summarizing the project outcomes, lessons learned, and recommendations for future improvements.
     3. Knowledge Transfer Documentation:
        1. Documentation that allows for easy transfer of knowledge to new IT staff regarding the jury system.

## COURT RESPONSIBILITIES

* 1. Appoint designated Court Project Manager (PM) upon execution of contract
  2. Designate court staff resources in the following areas for the duration of the project
     1. Jury Administration
     2. IT
     3. Finance
     4. Operations
  3. Provide virtual private network (VPN) access to vendor
  4. Provide Database access to vendor
  5. Develop User Acceptance Testing (UAT) Plan

**APPENDIX A**

JMS will contain the following, but not limited to, accounting payment fields required by the Court:

* Payment Date
* Juror Name
* Case Number
* Case Type
* Indicate Fees or Mileage
* Amount
* Court Location
* Address
* City
* Zip
* County
* State
* General Ledger Account

**Sample File Structure**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **DATE** | **JUROR  NAME** | **CASE  NUMBER** | **CASE  TYPE** | **FEES/ MILEAGE** | **G/L ACCT** | **AMOUNT** | **COURT  LOCATION** | **ADDRESS** | **CITY** | **ZIP** | **COUNTRY** | **STATE** |
| 1/3/2025 | JOHN N SMITH | FWV25001234 | CRIMINAL | FEES | 965101 | 15.00 | RANCHO | 247 W THIRD ST | SAN BERNARDINO | 92415 | US | CA |
| 1/3/2025 | JOHN N SMITH | FWV25001234 | CRIMINAL | MILEAGE | 965102 | 3.40 | RANCHO | 247 W THIRD ST | SAN BERNARDINO | 92415 | US | CA |

**APPENDIX B**

JMS will contain the following, but not limited to, juror information fields required by the Court:

* JurorID
* LastName
* FirstName
* MI
* NameSfx
* DOB
* Address
* City
* State
* Country
* Zip
* Zip4
* AreaCode
* PhoneNbr
* CellNbr
* Email
* District
* SumCourt
* Comment
* DataSource
* Sealed
* IndexLName
* IndexFName
* UpdatedDT
* UpdatedBy

*End of Exhibit A*