



CLACKAMAS COUNTY SHERIFF

Sheriff Angela Brandenburg

Jesse Ashby, Undersheriff

Michael Copenhaver, Undersheriff

Jenna Morrison, Undersheriff

April 16, 2024

BCC Agenda Date/Item: _____

Board of County Commissioners
Clackamas County

Approval of a Goods and Services Contract with Executive Information Services, Inc. for Jail Management Software. Contract value is \$912,748 over 14 months. Funding is through the Sheriff's Operating Levy and US Department of Justice Federal Forfeiture Funds. No County General Funds are involved.

| | | | |
|-------------------------------------|--|---------------------------|---------------|
| Previous Board Action/Review | No previous board action. | | |
| Performance Clackamas | Ensure safe, healthy and secure communities. | | |
| Counsel Review | A. Naylor | Procurement Review | T. Candelario |
| Contact Person | Nancy Artmann | Contact Phone | 503-785-5012 |

EXECUTIVE SUMMARY: EIS will provide an integrated Jail Management System (JMS), warrants management, Protections Orders subsystems and Civil Process application software to support the Clackamas County Sheriff's Office (CCSO). This software replaces a 30-year-old custom platform that no longer meets compliance and security requirements, lacks support, and requires specialized hardware. EIS's Jail Management System is in use at multiple area jails, including Washington and Clark Counties, has integrations with multiple third party commercial and state systems and is fully CJIS compliant. Additionally, the software runs on a standard Microsoft platform, making it compatible with the County's existing infrastructure and capable of rapid recovery during a natural disaster or other catastrophic event. This contract is purchased against the Washington County cooperative contract number 20-0095.

RECOMMENDATION: Staff recommends approval of this operating plan.

Respectfully submitted,

Sheriff Angela Brandenburg

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A Tradition of Service Since 1845

Office: 9101 SE Sunnybook Boulevard, Clackamas, Oregon 97015

Mailing: 2223 Kaen Road, Oregon City, Oregon 97045

Phone: 503-785-5000 **Fax:** 503-785-5190 **www.ClackCoSheriff.us**



**CLACKAMAS COUNTY
GOODS AND SERVICES CONTRACT
Contract #9134**

This Goods and Services Contract (this “Contract”) is entered into between **Executive Information Services, Inc.** (“Contractor”), and Clackamas County, a political subdivisions of the State of Oregon (“County”), on behalf of the Clackamas County Sheriff’s Department, for the purposes of providing Jail Management Software. This Contract is purchased against the Washington County cooperative contract, contract number 20-0095.

ARTICLE I.

1. **Effective Date and Duration.** This Contract shall become effective upon signature of both parties and shall remain in effect until **June 30, 2025** or until completion of all obligations provided herein, whichever is later.
2. **Scope of Work.** The Contractor shall provide the goods and services identified in Exhibit A (the “Work”), attached hereto and incorporated by reference herein. Work shall be performed in accordance with a schedule approved by the County. County’s use of the software provided as part of the Work is subject to the terms and conditions set forth in Exhibit C, attached hereto and incorporated by this reference herein.
3. **Consideration.** The County agrees to pay Contractor, from available and authorized funds, as follows:

| | | |
|-------------------------------|-----|--------------|
| Due on Contact execution | 40% | \$365,099.20 |
| Due on Installation | 30% | \$273,824.40 |
| Due on Completion of training | 20% | \$182,549.60 |
| Due on Acceptance | 10% | \$91,274.80 |

The total amount County may pay Contractor for performing the Work required by this Contract shall not exceed **Nine Hundred Twelve Thousand Seven Hundred Forty-Eight dollars (\$912,748.00)**. Consideration rates are on a fixed fee basis in accordance with the rates and costs specified in Exhibit B. If any interim payments to Contractor are made, such payments shall be made only in accordance with the schedule and requirements in Exhibit B.

4. **Invoices and Payments.** Unless otherwise specified, Contractor shall submit monthly invoices for Work performed. Invoices shall describe all Work performed with particularity, by whom it was performed, and shall itemize and explain all expenses for which reimbursement is claimed. The invoices shall include the total amount billed to date by Contractor prior to the current invoice. If Contractor fails to present invoices in proper form within sixty (60) calendar days after the end of the month in which the services were rendered, Contractor waives any rights to present such invoice thereafter and to receive payment therefor. Payments shall be made to Contractor within forty-five (45) days following the County’s review and approval of invoices submitted by Contractor. Contractor shall not submit invoices for, and the County will not be obligated to pay, any amount in excess of the maximum compensation amount set forth above. If this maximum compensation amount is increased by amendment of this Contract, the amendment must be fully effective before Contractor performs Work subject to the amendment. Payment information will be reported to the Internal Revenue Service (“IRS”) under the name and taxpayer ID number submitted. (See I.R.S.

1099 for additional instructions regarding taxpayer ID numbers.) Information not matching IRS records will subject Contractor payments to backup withholding.

Invoices shall reference the above Contract Number and be submitted to:

- 5. **Travel Expense Reimbursement.** Authorized: Yes No
If travel expense reimbursement is authorized in this Contract, such expenses shall only be reimbursed at the rates in the County Contractor Travel Reimbursement Policy, hereby incorporated by reference, in effect at the time of the expense is incurred.
- 6. **Contract Documents.** This Contract consists of the following documents, which are listed in descending order of precedence and are attached and incorporated by reference, this Contract, Exhibit A, Exhibit B, and Exhibit C. The specific terms of this Contract supersede any conflicting terms stated in the above referenced Washington County, OR Contract #20-005. In all other respects, the work shall be performed pursuant to the terms and conditions of the Washington County Contract #20-005, which is attached hereto as Exhibit C incorporated by this reference herein.

7. **Contractor and County Contacts.**

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| Contractor Administrator: Adam Missler Phone: 8(856) 701-6107 Email: adam@goeis.net | County Administrator: Tony Docekal Phone: 503-785-5050 Email: tDocekal@clackamas.us |
|---|--|

ARTICLE II.

- 1. **Access to Records.** Contractor shall maintain books, records, documents, and other evidence, in accordance with generally accepted accounting procedures and practices, sufficient to reflect properly all costs of whatever nature claimed to have been incurred and anticipated to be incurred in the performance of this Contract. County and their duly authorized representatives shall have access to the books, documents, papers, and records of Contractor, which are directly pertinent to this Contract for the purpose of making audit, examination, excerpts, and transcripts. Contractor shall maintain such books and records for a minimum of six (6) years, or such longer period as may be required by applicable law, following final payment and termination of this Contract, or until the conclusion of any audit, controversy or litigation arising out of or related to this Contract, whichever date is later.
- 2. **Availability of Funds.** Any continuation or extension of this Contract after the end of the fiscal period in which it is written is contingent on a new appropriation for each succeeding fiscal period sufficient to continue to make payments under this Contract, as determined by the County in its sole administrative discretion.
- 3. **Captions.** The captions or headings in this Contract are for convenience only and in no way define, limit, or describe the scope or intent of any provisions of this Contract.
- 4. **Compliance with Applicable Law.** Contractor shall comply with all applicable federal, state and local laws, regulations, executive orders, and ordinances, as such may be amended from time to time.
- 5. **Governing Law.** This Contract, and all rights, obligations, and disputes arising out of it, shall be governed and construed in accordance with the laws of the State of Oregon and the ordinances of Clackamas County without regard to principles of conflicts of law. Any claim, action, or suit between County and Contractor that arises out of or relates to the performance of this Contract shall be brought and conducted solely and exclusively within the Circuit Court for Clackamas County, for the State of Oregon. Provided, however, that if any such claim, action, or suit may be brought in a

federal forum, it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. In no event shall this section be construed as a waiver by the County of any form of defense or immunity, whether sovereign immunity, governmental immunity, immunity based on the Eleventh Amendment to the Constitution of the United States or otherwise, from any claim or from the jurisdiction of any court. Contractor, by execution of this Contract, hereby consents to the personal jurisdiction of the courts referenced in this section.

- 6. Hazard Communication.** Contractor shall notify County prior to using products containing hazardous chemicals to which County employees may be exposed, which includes any hazardous, toxic, or dangerous substance, waste, or material that is the subject of environmental protection legal requirements or that becomes regulated under any applicable local, state or federal law, including but not limited to the items listed in the United States Department of Transportation Hazardous Materials Table (49 CFR §172.101) or designated as hazardous substances by Oregon Administrative Rules, Chapter 437, or the United States Environmental Protection Agency (40 CFR Part 302), and any amendments thereto. Upon County's request, Contractor shall immediately provide Safety Data Sheets for the products subject to this provision.

7. Responsibility for Damages; Indemnity.

Contractor shall defend, indemnify and hold harmless the County, its agents, officers, elected officials and employees from and against all claims, demands and judgments (including attorney fees) made or recovered against them for damages to real or tangible property or for bodily injury or death to any person, arising out of, or in connection with this Contract, to the extent such damage, injury or death is caused or sustained in connection with the negligent performance or willful misconduct of Contractor, or its employee, agents or subcontractors. The County agrees to promptly notify Contractor in writing of any such claim or demand to indemnify and agrees to cooperate with Contractor in a reasonable manner to facilitate the defense of such claim.

- 8. Independent Contractor Status.** The service(s) to be rendered under this Contract are those of an independent contractor. Although the County reserves the right to determine (and modify) the delivery schedule for the Work to be performed and to evaluate the quality of the completed performance, County cannot and will not control the means or manner of Contractor's performance. Contractor is responsible for determining the appropriate means and manner of performing the Work. Contractor is not to be considered an agent or employee of County for any purpose, including, but not limited to: (A) The Contractor will be solely responsible for payment of any Federal or State taxes required as a result of this Contract; and (B) This Contract is not intended to entitle the Contractor to any benefits generally granted to County employees, including, but not limited to, vacation, holiday and sick leave, other leaves with pay, tenure, medical and dental coverage, life and disability insurance, overtime, Social Security, Workers' Compensation, unemployment compensation, or retirement benefits.

- 9. Insurance.** Contractor shall secure at its own expense and keep in effect during the term of the performance under this Contract the insurance required and minimum coverage indicated below. The insurance requirement outlined below do not in any way limit the amount of scope of liability of Contractor under this Contract. Contractor shall provide proof of said insurance and name the County as an additional insured on the Commercial General Liability policy. Proof of insurance and notice of any material change should be submitted to the following address: Clackamas County Procurement Division, 2051 Kaen Road, Oregon City, OR 97045 or procurement@clackamas.us.

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| <input checked="" type="checkbox"/> Required - Workers Compensation: Contractor shall comply with the statutory workers' compensation requirements in ORS 656.017, unless exempt under ORS 656.027 or 656.126. |
| <input checked="" type="checkbox"/> Required – Commercial General Liability: Combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence, with an annual aggregate limit of \$2,000,000 for Bodily Injury and Property Damage. |
| <input checked="" type="checkbox"/> Required – Professional Liability: Combined single limit, or the equivalent, of not less than \$1,000,000 per claim, with an annual aggregate limit of \$2,000,000 for damages caused by error, omission or negligent acts. |
| <input type="checkbox"/> Required – Automobile Liability: Combined single limit, or the equivalent, of not less than \$1,000,000 per accident for Bodily Injury and Property Damage. |
| <input checked="" type="checkbox"/> Required - Cyber Liability: Combined single limit, or the equivalent, of not less than \$1,000,000 per occurrence for network security (including data breach), privacy, interruption of business, media liability, and errors and omissions. |

The policies shall be primary insurance as respects to the County. Any insurance or self-insurance maintained by the County shall be excess and shall not contribute to it. Any obligation that County agree to a waiver of subrogation is hereby stricken.

- 10. Limitation of Liabilities.** This Contract is expressly subject to the debt limitation of Oregon counties set forth in Article XI, Section 10, of the Oregon Constitution, and is contingent upon funds being appropriated therefore. Any provisions herein which would conflict with law are deemed inoperative to that extent. Except for liability arising under or related to Article II, Section 14 or Section 21, neither party shall be liable for (i) any indirect, incidental, consequential or special damages under this Contract or (ii) any damages of any sort arising solely from the termination of this Contract in accordance with its terms.

Contractor agrees to perform the services outlined in Exhibit A in a professional manner and as otherwise set forth in this Contract. Contractor warrants that custom and standard public safety application software provided to County will perform as specified by the Contract and in Contractor's proposal. Except for claims arising from Contractor's gross negligence or intentional acts, If Contractor is unable to cause software to perform as agreed, County shall be limited to its damages to a refund of the money paid for these services. County expressly agrees that Contractor shall not be liable to the County for any loss, liability, damage, cost or expense of County resulting from, or attributable to, the performance of the services. Except as provided herein, Contractor neither makes nor intends any express or implied warranties of any description including merchantability and/or fitness with respect to the services or any product thereof. Contractor disclaims all other warranties, either expressed or implied and representations with respect to the Software, except as stated in this Contract. In no event shall Contractor or its vendors, suppliers or licensors be liable to County or any third party for any indirect, incidental, special or exemplary or consequential damages, including without limitation, loss of profits or benefits, arising out of this agreement and even if advised of the possibility of such damages. In no event shall Contractor or its vendors, suppliers or licensors liability, whether in contract, tort or otherwise, will not exceed the amount of monies received by Contractor from County in connection with this Contract. The parties acknowledge that absent such limitation, Contractor would not be able to provide the equipment and services or license the licensed software to County for the consideration set forth in Exhibit B. The cumulative liability of Contractor to the County for all claims arising in connection with this agreement shall not exceed the total fees and charges paid to Contractor by the County within the last 12 months.

- 11. Notices.** Except as otherwise provided in this Contract, any required notices between the parties shall be given in writing by personal delivery, email, or mailing the same, to the Contract Administrators identified in Article 1, Section 6. If notice is sent to County, a copy shall also be sent to: Clackamas

County Procurement, 2051 Kaen Road, Oregon City, OR 97045, or procurement@clackamas.us. Any communication or notice so addressed and mailed shall be deemed to be given five (5) days after mailing, and immediately upon personal delivery, or within 2 hours after the email is sent during County's normal business hours (Monday – Thursday, 7:00 a.m. to 6:00 p.m.) (as recorded on the device from which the sender sent the email), unless the sender receives an automated message or other indication that the email has not been delivered.

12. Ownership of Work Product. Except for the limited license set forth herein, all rights, title and interests to and in the Licensed Software and any accompanying documentation (as defined in Exhibit C), including without limitation all trademarks, service marks, patents, copyrights, trade secrets and other proprietary rights therein, are reserved and will remain the exclusive property of the Contractor or its licensors. The County will not take any action that jeopardizes Contractor or its licensors' proprietary rights. The County acknowledges and agrees that it acquires no right in the Software, except the limited use license specified in Exhibit C. Any materials created under this Contract that are developed exclusively for the use of the County ("Work Product") as indicated by the corresponding Statement of Work or other agreement or documentation, shall be the exclusive property of the County. Such Work Product can include, but is not limited to: databases, templates, file formats, scripts, links, procedures, materials, training manuals and other training materials, specially created key commands, To the extent that such Work Product may use pre-existing intellectual property of the Contractor, the Contractor grants the County a limited, non-exclusive, royalty-free, non—sublicensable, license in such pre-existing intellectual property, for its own internal use in conjunction with the Work Product.

13. Representations of Warranties. Contractor represents and warrants the following:

- A. Contractor has the power and authority to enter into and perform this Contract;
- B. This Contract, when executed and delivered, shall be a valid and binding obligation of Contractor enforceable in accordance with its terms;
- C. Contractor shall, at all times during the term of this Contract, be qualified, professionally competent, and duly licensed to perform the Work;
- D. Contractor is an independent contractor as defined in ORS 670.600.
- E. If providing services, the services provided by Contractor under this Contract will be performed in a workmanlike manner and in accordance with the highest professional standards.

The warranties set forth in this section are in addition to, and not in lieu of, any other warranties provided.

14. Delivery and Inspections.

- A. All deliveries shall be F.O.B. destination with all transportation and handing charges paid by the Contractor, unless specified otherwise in this Contract. Responsibility and liability for loss or damage shall remain with the Contractor until final inspection and acceptance, when responsibility shall pass to the County except as to latent defects, fraud and Contractor's warranty obligations.
- B. Goods furnished under this Contract will be subject to inspection and test by the County at times and places determined by the County in its sole discretion. If the County finds the goods furnished to be incomplete or not in compliance with the Contract, the County, in its sole discretion, may either reject the goods, require Contractor to correct any defects without charge, or negotiate with Contractor to sell the goods to the County at a reduced price. If Contractor is unable or refuses to cure any defects within a time deemed reasonable by the County, the County may reject the goods, terminate the Contract, and pursue any and all rights and remedies available to County at law, in

equity, or under this Contract. Nothing in this paragraph shall in any way affect or limit the County's rights as a buyer, including the rights and remedies relating to rejection under ORS 72.6020 and revocation of acceptance under ORS 72.6080.

- 15. Survival** All rights and obligations shall cease upon termination or expiration of this Contract, except for the rights and obligations set forth in Article II, Sections 1, 5, 6, 7, 10, 12, 13, 15, 16, 17, 18, 21, 22, 23, 27, 30, and 32, and all other terms and conditions which by their context are intended to survive termination of this Contract.
- 16. Severability.** If any term or provision of this Contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the Contract did not contain the particular term or provision held to be invalid.
- 17. Subcontractors and Assignments.** Contractor shall not enter into any subcontracts for any of the work required by this Contract, or assign or transfer any of its interest in this Contract by operation of law or otherwise, without obtaining prior written approval from the County. In addition to any provisions the County may require, Contractor shall include in any permitted subcontract under this Contract a requirement that the subcontractor be bound by this section and Article II, Sections 1, 7, 8, 13, 22, and 31, as if the subcontractor were the Contractor. County's consent to any subcontract shall not relieve Contractor of any of its duties or obligations under this Contract.
- 18. Successors in Interest.** The provisions of this Contract shall be binding upon and shall inure to the benefit of the parties hereto, and their respective authorized successors and assigns.
- 19. Tax Compliance and Certifications.** The Contractor shall comply with all federal, state and local laws, regulation, executive orders and ordinances applicable to this Contract. Contractor represents and warrants that it has complied, and will continue to comply throughout the duration of this Contract and any extensions, with all tax laws of this state or any political subdivision of this state, including but not limited to ORS 305.620 and ORS chapters 316, 317, and 318. Any violation of this section shall constitute a material breach of this Contract and shall entitle County to terminate this Contract, to pursue and recover any and all damages that arise from the breach and the termination of this Contract, and to pursue any or all of the remedies available under this Contract or applicable law.
- 20. Termination.** This Contract may be terminated for the following reasons: (A) by mutual agreement of the parties or by the County (i) for convenience upon thirty (30) days written notice to Contractor, or (ii) at any time the County fails to receive funding, appropriations, or other expenditure authority as solely determined by the County; or (B) if contractor breaches any Contract provision or is declared insolvent, County may terminate after thirty (30) days written notice with an opportunity to cure.

Upon receipt of written notice of termination from the County, Contractor shall immediately stop performance of the Work. Upon termination of this Contract, Contractor shall deliver to County all documents, Work Product, information, works-in-progress and other property that are or would be deliverables had the Contract Work been completed. Upon County's request, Contractor shall surrender to anyone County designates, all documents, research, objects or other tangible things needed to complete the Work.

- 21. Remedies.** If terminated by the County due to a breach by the Contractor, then the County shall have any remedy available to it at law, in equity, or under this Contract. If this Contract is terminated for any other reason, Contractor's sole remedy is payment for the goods and services delivered and accepted by the County. Upon early termination of this Contract for any reason other than breach, County will only pay Contractor for the portion of Work described in the table set forth in Article I,

Section 3, above, that Contractor has successfully completed prior to County issuing a notice of termination.

All rights and remedies of County and Contractor shall be cumulative and may be exercised successively or concurrently. The foregoing is without limitation to or waiver of any other rights or remedies of County according to law.

- 22. No Attorney Fees.** In the event any arbitration, action or proceeding, including any bankruptcy proceeding, is instituted to enforce any term of this Contract, each party shall be responsible for its own attorneys' fees and expenses.
- 23. No Third Party Beneficiaries.** County and Contractor are the only parties to this Contract and are the only parties entitled to enforce its terms. Nothing in this Contract gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this Contract.
- 24. Time is of the Essence.** Contractor agrees that time is of the essence in the performance of this Contract
- 25. Foreign Contractor.** If the Contractor is not domiciled in or registered to do business in the State of Oregon, Contractor shall promptly provide to the Oregon Department of Revenue and the Secretary of State, Corporate Division, all information required by those agencies relative to this Contract. The Contractor shall demonstrate its legal capacity to perform these services in the State of Oregon prior to entering into this Contract.
- 26. Force Majeure.** Neither County nor Contractor shall be held responsible for delay or default caused by fire, terrorism, riot, acts of God, or war where such cause was beyond, respectively, County's or Contractor's reasonable control. Contractor shall, however, make all reasonable efforts to remove or eliminate such a cause of delay or default and shall upon the cessation of the cause, diligently pursue performance of its obligations under this Contract.
- 27. Waiver.** The failure of County to enforce any provision of this Contract shall not constitute a waiver by County of that or any other provision.
- 28. Public Contracting Requirements.** Pursuant to the public contracting requirements contained in Oregon Revised Statutes ("ORS") Chapter 279B.220 through 279B.235, Contractor shall:
 - a. Make payments promptly, as due, to all persons supplying to Contractor labor or materials for the prosecution of the work provided for in the Contract.
 - b. Pay all contributions or amounts due the Industrial Accident Fund from such Contractor or subcontractor incurred in the performance of the Contract.
 - c. Not permit any lien or claim to be filed or prosecuted against County on account of any labor or material furnished.
 - d. Pay the Department of Revenue all sums withheld from employees pursuant to ORS 316.167.
 - e. As applicable, the Contractor shall pay employees for work in accordance with ORS 279B.235, which is incorporated herein by this reference. The Contractor shall comply with the prohibitions set forth in ORS 652.220, compliance of which is a material element of this Contract, and failure to comply is a breach entitling County to terminate this Contract for cause.
 - f. If the Work involves lawn and landscape maintenance, Contractor shall salvage, recycle, compost, or mulch yard waste material at an approved site, if feasible and cost effective.

- 29. Merger.** This Contract constitutes the entire agreement between the parties with respect to the subject matter referenced herein. There are no understanding, agreements, or representations, oral or written, not specified herein regarding this Contract. Contractor, by the signature hereto of its authorized representative, acknowledges having read and understood this contract and Contractor agrees to be bound by its terms and conditions.
- 30. Execution and Counterparts.** This Contract may be executed in several counterparts (electronic or otherwise), each of which shall be an original, all of which shall constitute the same instrument.
- 31. Amendment.** This Contract may only be modified in writing signed by the parties.
- 32. Confidentiality.** Contractor may disclose to County information which it considers confidential and proprietary, including without limitation, documentation, plans, business and technical information, marketing and other materials, software and data (“Proprietary Information”). County shall keep the Proprietary Information in confidence, protect the Proprietary Information from disclosure to third parties and restrict its use as provided in this AGREEMENT. County shall not copy Proprietary Information, in whole or in part, except as authorized by County in writing. County acknowledges that unauthorized disclosure of Proprietary Information may cause substantial economic loss to Contractor and/or its vendors, suppliers and licensors and Contractor is entitled to obtain injunctive or other equitable relief in connection therewith

Upon termination or cancellation of this AGREEMENT or any License granted hereunder, (i) the License to all Licensed Software, in the case of termination or cancellation of this AGREEMENT, (ii) the License to the specific item of Licensed Software, in the case of the termination or cancellation of the License to a specific item of Licensed Software, shall automatically terminate and (iii) County shall destroy (and certify such destruction in writing,) or return to Contractor all copies of the Licensed Software and any other Proprietary Information in County's possession.

All Proprietary Information shall remain the property of Contractor or its vendors, suppliers, and licensors, as the case may be. Any ideas, concepts, inventions, know-how, data processing techniques, software, documentation, diagrams, schematics, blueprints or other materials developed by Contractor personnel (alone or jointly with County) in connection with this AGREEMENT shall be the exclusive property of Contractor.

County shall inform and instruct its employees and agents of their obligations under this Section 32.

Limits on Confidential Information. Confidential information shall be deemed proprietary to the Contractor except to the extent such information or portions of such information are deemed not to be confidential or privileged under state or federal law. Confidential Information shall not be deemed proprietary and the County shall have no obligation with respect to such information where the information (i) was independently developed by County without the use of the Confidential Information; or (ii) was ordered to be publicly released by the County by a court or competent jurisdiction.

Notwithstanding anything to the contrary, County’s obligations under this agreement are expressly subject to the Oregon Public Records Law, Oregon Revised Statutes (“ORS”) Chapter 192 et. seq., While County will make good faith efforts to perform under this agreement, County’s disclosure of Confidential Information, in whole or in part, will not be a breach of the Agreement if such disclosure was pursuant to a request under the Oregon Public Records Law (“Public Records Request”) and was not otherwise subject to an exemption under Oregon state law and the Contractor was duly notified pursuant to this Section, or if such disclosure was compelled by deposition, interrogatory, request for documents, subpoena, civil investigative demand, or similar processes (“Disclosure Order”) and the Contractor was duly notified pursuant to the terms of this Section..

If County is subject to such a Disclosure Order or receives from a third party any Public Records Request (collectively “Request”) for the disclosure of Confidential Information, County shall notify Contractor within a reasonable period of time of the Request so that the Contractor is not otherwise unduly prejudiced. Contractor is exclusively responsible for defending Contractor’s position concerning the confidentiality of the requested information. Except to the extent that it may be required to do so by law or court or administrative order, County is not required to assist Contractor in opposing disclosure of Confidential Information, nor is County required to provide a legal opinion as to whether the Confidential Information is protected under ORS Chapter 192, et. seq., or other applicable state or federal law. Further, notwithstanding any obligations that may be in this Agreement, Contractor shall not be obligated, except as may otherwise be required under statute, to indemnify, pay, or otherwise compensate, the County for any costs, attorneys fees, fines, penalties, or fees incurred as a result of its activities under this Section.

By their signatures below, the parties to this Contract agree to the terms, conditions, and content expressed herein.

Executive Information Services, Inc.

PO BOX 74008484

Chicago, IL 60674

Jean Soucy

Digitally signed by Jean Soucy
Date: 2024.04.05 11:37:53 -04'00'

Clackamas County

Authorized Signature Date

Jean Soucy

Name / Title (Printed)

1454134-98

Oregon Business Registry #

FBC/NV

Entity Type / State of Formation

Chair Date

Recording Secretary

Approved as to Form:

Andrew Naylor

Digitally signed by Andrew Naylor
Date: 2024.04.08 05:39:52 -07'00'

County Counsel Date

EXHIBIT A
SCOPE OF WORK

Exhibit A

CLACKAMAS COUNTY JMS STATEMENT OF WORK

Ver. 4 - 1/5/2024

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STATEMENT OF WORK

Clackamas County Sheriff's Office, Oregon

Purpose

The purpose of this document is to define the software and services being provided by EIS Corporation (EIS) to the Clackamas County Sheriff's Office (CCSO), OR as part of the Jail Management, Warrants, Protection Orders and Civil Software project. The activities associated with the implementation of the Jail and designated RMS software have been identified through a set of tasks itemized within this Statement of Work (SOW).

The following Statement of Work (SOW) defines the principal activities and responsibilities of all parties for the implementation of an integrated Jail Management System (JMS), warrants management, Protection Orders sub-systems and Civil Process application software to support Clackamas County (hereinafter called the "CCSO") information management operations. The system will be composed of the following primary software components, with the installed software being the latest software release that is available at the time of installation. Unless otherwise indicated from the context in which it is used, the word "system" will be used herein to refer to the compilation of the foregoing subsystems, interfaces, and ancillary software components.

The deliverable groups are divided into defined sets of tasks and elements, each with a specific acceptance criterion usually tied to a project milestone. Some deliverables focus on the same project element; however, each defined deliverable constitutes a specific task or delivery activity related to the item. (e.g., software deliverables include 1. Licensing of the software, 2. installation of the software, 3. Configuration of the software and 4. Testing and acceptance of the software). Project deliverables are divided as follows:

1. **Project Planning Deliverables** – these constitute a set of activities related to project management and coordination services. These are services only.
2. **Software Delivery Deliverables** – these include the preliminary licensing grants and component listings for all EIS provided software purchased by the agency. Software licensing deliverables include only the licensing and delivery of the actual software to the customer site. Installation and configuration tasks are managed independently as separate deliverables.
3. **Platform and 3rd party Deliverables** – these EIS tasks related to County provided platform services and any licensable 3rd party components.
4. **Software Installation and Configuration Deliverables** – these activities address the deployment of software to the designated hosting platform and the base level configuration services apply to the COTS (commercial off the shelf) software.
5. **Interface Development and Deployment** – specific interface and data exchange system components, that are most often a combination of software, services, and custom development. Since interfaces are intended to perform a single task, the deliverable is focused on the final result and will generally include the aggregated components required to complete.
6. **Software Customization & Development Tasks** – these deliverables represent contract modifications to the base COTS software that have been specifically identified and/or purchased by the agency. Deliverable scoping is sufficient to define the major scope of the customization, and a final, detailed development specification will be approved by CCSO prior to commencement of development.
7. **Functional Acceptance Testing (FAT)** - this event is typically construed as a project milestone.
8. **Data Conversion/Migration Tasks** – these tasks identify the data sources and general framework associated with data conversion. Differing data types (e.g., data vs images) may be separated into individual deliverables even though originating from the same system.
9. **User Training Services** – these tasks define the training services purchased by the agency related to major software modules and training hour commitments.
10. **Go-Live Services** – this event is construed as a project milestone.
11. **System Acceptance/Final Acceptance** - this event is construed as a project milestone.

Deliverables Overview

The Project Task Section of this document lists and defines the project deliverables that EIS will provide as part of the contract.

Project Planning Deliverables (PO & PP)

- **Project Organization.**

EIS will designate a senior experienced manager that will be assigned for the duration of the project. This person provides a direct point of contact for the Agency. Coordinate and conduct the Project Kickoff Meeting. Develop and maintain the joint Project Plan including the Responsibility Matrix. Provide frequent Status Reports as agreed upon by both parties.

- An EIS Project Manager will be assigned to this project. EIS will designate a senior project manager for the duration of the project as the direct point of contact for the CCSO.

- **Customer Organization Meeting**

- EIS and CCSO project teams meet to further define the project, review the deliverables, CCSO hardware requirements, and establish an implementation schedule and procedures.

- **Project Specification and Implementation Plan**

The initial EIS Project Plan shall be developed in conjunction with the Agency Project Manager upon project commencement and shall be submitted for acceptance. The activities that are scheduled to begin between submission of the initial EIS Project Plan and acceptance thereof shall not be delayed before acceptance of the initial EIS Project Plan.

- CCSO and EIS develop and accept a Project Plan. The Project Plan will include a project synopsis, project organization and staffing, overview of deliverables, implementation schedule, training plan, data conversion plan, and cut-over and live operation plans.
- It is estimated that the full implementation will require approximately **Twelve to Fourteen (12-14)** months from date of order. Due to the scope, the implementation may be phased to accommodate individual CCSO schedules and EIS resources.

Servers, Hardware and 3rd Party Deliverables (HW & PLAT)

- **System Hardware (Servers, Workstations, Peripheral Devices & Networking**

- If hosted solution is provided by EIS (PLAT) designation will be used, is provided by CCSO (HW) designation will be used.
- All system hardware and required infrastructure components installed on/in agency premises or under agency control are to be provided by CCSO.
- On-Premise: All system hardware will be installed on the CCSO network, provisioned and made ready for EIS software deployment in accordance with the software environment requirements by CCSO.
- Any peripheral hardware not directly purchased from EIS will be provided by the agency.

- **System Preparation**

- EIS Staff will physically install EIS server-side software on to the provided/provisioned servers, provide a workstation installer & deployment package for CCSO's use in accordance with the software licensed by the agency.

Software Delivery Deliverables (SFTW)

- **Application Software**
 - Jail Management software suite, designated RMS modules and supporting applications, interfaces and customizations as listed in this document and in accordance with the detailed responses provided by EIS in association with the items detailed in the SOW.

Software Agency Specific Configuration Deliverables (ICFG)

- **Software Configuration**
 - The configuration phase is an iterative process coordinated with the CCSO project team. Updates and configuration decisions are deployed to the production level CCSO system as they become available. Iterations include the initial concentrated functional review workshop, followed by review sessions as specified in the project plan. Configuration changes will be implemented on the production system and made available to the CCSO project team for evaluation.

Interface Development and Deployment (INTR)

Each system interface will be developed and deployed in accordance with the EIS interface specifications accepted by the CCSO. Once accepted, the development interface specification will be the presiding document and be incorporated into the contract forthwith. All interfaces are subject to dependencies and are partially reliant on factors beyond the control of EIS. As such, the deliverable items related to all interfaces are directly dependent on the availability of external resources (connections to foreign systems, data, and other external components). System interfacing will be dependent on the system software up and fully running before a successful interface can be completed by EIS. Delays related to the required dependencies are not the responsibility of EIS.

All interfaces with other products will be completed as quickly as possible, however without the cooperation of the third-party software vendors, implementation could be delayed. This would not be the responsibility of EIS and outside the scope of the SOW. CCSO agrees that the installation of the various interfaces on CCSO production system that comply with the agreed upon specification satisfies the interface requirement regardless of third-party issues and delays.

- **System Interfaces**
 - Interfaces to Third Party Systems as Itemized within the interface task elements presented in this SOW. Deliverables are defined by specific transaction, and as such multiple interfaces to the same vendor or system may be presented as separate deliverables.
 - Deliverable acceptance criteria are based on the development and installation services provided wholly by EIS and directly under EIS's control and are not dependent on the external system or vendor's success in utilizing the interface/integration component.
 - Interface descriptions provided within this Statement of Work (SOW) are designed to illustrate the fundamental transactions and processing directives associated with the data exchange and sufficient level to determine the scope of work and associated pricing. **An interface development specification will be provided for each interface referenced in the SOW following contract execution for CCSO approval.** The interface specification will detail the precise interface operations, including data definitions, transaction control protocols, connectivity requirements, etc. Once accepted and approved by CCSO, the interface specification becomes the definition of the interface deliverable and supersedes any representations provided in the SOW.
 - Interface integration and configuration services are included in each interface deliverable.

- CCSO is fully responsible for providing communication capabilities between the EIS interface endpoint and the remote systems endpoint.

Software Customization & Development Tasks (DEV)

The project does include software development services specifically related to deliverable components referenced within this Statement of Work. All development work is performed to modify or enhance existing functions provided within the EIS application software. All software modifications, enhancements or reports developed as part of this project are incorporated into the commercial JMS product licensed from EIS and is fully owned by EIS. No software modifications, enhancements or reports developed as part of this project shall be construed as a “Work for Hire”.

- Software development descriptions provided within this Statement of Work (SOW) are designed to illustrate the fundamental change and/or processing directives associated with the software development task at a sufficient level to determine the scope of work and associated pricing. **A software development specification will be provided for each software development deliverable referenced in the SOW following contract execution for CCSO approval.** The software development specification will detail the precise customization or modification to be implemented, including UI concepts, underlying data calculations, processing protocols, etc. Once accepted and approved by CCSO, the software development specification becomes the definition of the software development deliverable and supersedes any representations provided in the SOW.

Functional Acceptance Testing (FAT)

- Prior to scheduling system go-live, CCSO will perform Functional Acceptance Testing to ensure the delivered software and supporting components installed are operational at CCSO and substantially configured to meet agency use policy and procedures. Functional Acceptance Testing will be performed on the production system. Interfaces and data exchanges may be excluded from preliminary Functional Acceptance Testing as most active interface endpoints do not support testing environments.

Data Conversion/Migration Tasks (DCON)

- EIS will develop a Data Migration Plan based on the quality of data provided by the agency for agency review and approval. This plan will provide a summary overview of the major data conversion tasks, document agency specific directives including mitigation decisions.
- EIS will perform Data Conversion and will verify data completeness and accuracy in accordance with the agreed upon Data Migration Plan and migration processing directives. CCSO Project Team responsible to verify the quality and consistency of the final delivered data conversion.

● **Data Conversion/Migration**

- CCSO JMS – Local System data migration and Mugshots
- CCSO Warrants – Local System data migration
- CCSO Civil – Local System data migration
- Note: No media (documents, images, video or audio files) are to be converted.

User Training Services (TRN)

The CCSO must provide a training location with a minimum of 20 workstations for training that meet the minimum hardware requirements for JMS. The training location must be free of distractions and the scheduling of staff must be uninterrupted for the duration of the training. CCSO will ensure that a subject matter expert level staff member

is present during each training who can address agency policy and procedure questions that arise during the training and are not addressed in the use policy document.

The training schedule will be drawn up as part of the Implementation Plan with assistance from the CCSO Project Manager.

Training assignments will be the responsibility of the CCSO with input from EIS staff on who should be trained in which modules. The CCSO will be responsible for coordinating CCSO personnel to attend scheduled training sessions. Training to include:

1. JMS Administrator Training.
2. Direct End-User training for designated users of the software within the CCSO.
3. Train the Trainer Training for agency designated JMS Trainers.
4. software documentation, including user manuals, application notes with rights to reproduce within the agencies.
5. SSRS report development training.

- **Training Services**

- Training as agreed in the Implementation Plan, within the training hours purchased by the CCSO;
- Administrator
- End User

- **Software Training Documentation**

- Specified System documentation. EIS will provide software documentation in electronic format only.
- JMS Users Guide
- JMS Training Guide

Go-Live Services (GL)

- **Live Operation**

- EIS arrives on site in advance of system transition to resolve outstanding issues and complete any required updates.
- CCSO JMS users are trained in the use of the software and training documents are provided.
- CCSO RMS users are trained in the use of the software and training documents are provided.
- EIS to complete final data conversion, CCSO to validate final data conversion.
- EIS and CCSO users complete the acceptance testing and CCSO sponsor must provide signoffs.
- Internal system auto-assigned values are set to next appropriate in sequence.
- The system converts to live operation.
- EIS provides on-site start-up support and go-live assistance for specified period of time indicated in the approved project plan.

System Acceptance/Final Acceptance (COM)

- **Customer Validation and Testing**

- CCSO will perform a final validation of data conversion for business use.

Additional Project Information

Substitute Products

EIS, Inc. reserves the right, as part of the requirements stated herein, to provide products and services of equal or better quality, of comparable value and certified for operation with EIS systems that are available at the time of installation or delivery. These substitutions will be at no additional cost to CCSO, unless the scope of the project is modified by change order. Deviations and changes to this SOW are subject to mutual agreement between EIS and the CCSO. Any substitutions proposed by EIS must be accepted, in writing, by Clackamas County.

Change Control Procedures

Change Requests can be initiated by either party. Using the Change Control Form, the Receiving Party will review any change requests, conduct an impact analysis, propose alternative approaches, if any, and advise the Initiating Party of the findings with all associated additional fees and schedule impacts within a reasonable timeframe of the Receiving Party's receipt of any such Change Control Form. Changes shall be made as amendments to the Statement of Work and shall set out the nature of the change, the new fee and schedule, and any other agreed upon services. Amendments shall only be effective when signed by the CCSO and EIS. Changes to the software may require additional time to complete and fall outside of the deliverable schedules defined in the approved project plan. Changes may be targeted for delivery outside of the project deployment window by mutual agreement between EIS and CCSO.

The change control form will be developed by EIS for use as required. Once received and reviewed, the receiver will make a determination as to how to proceed with the request.

- a. If the change can be implemented with no substantial change to the scope of the project, the change can be approved at no charge and forwarded to the Project Manager for implementation.
- b. If the change is outside the original design and scope of the project, the change can be approved with an additional charge (if approved) and forwarded to the Project Manager for implementation.
- c. Save the change as a future release request (specified date or unspecified date, these requests are not binding, and EIS is not committing to provide such a feature.).
- d. Disapprove the change as there is no implementation path supported by the software.

Either EIS or CCSO may request changes to this Statement of Work at any time. Because such changes could significantly affect the cost, schedule, or other critical aspects of the work being performed, both CCSO and EIS must approve each change request in writing prior to implementation. The following change control procedure will be used except as superseded by mutual agreement or other binding procedures:

1. A "Change Request" (CR) prepared in a form and format acceptable to both CCSO and EIS will be the vehicle for communicating change.
2. A "Change Request" must describe the requested change, the rationale for the change, and any anticipated effect the change will have on the contract and/or the work performed under the contract.
4. CCSO and/or EIS should complete all reviews and officially approve or reject an issued "Change Request" within ten (10) business days of receipt.
5. Resolution of open issues concerning the definition, submission, acceptance, rejection, or implementation of all "Change Request" 's will occur via resolution process mutually selected by and agreeable to CCSO and EIS.

Other Issues

The CCSO is responsible for providing all hardware and software that conforms to the minimum requirements as outlined by EIS (See EIS publication on minimum hardware software standards) for all system components not specifically included in the EIS cost proposal.

Exclusions

EIS implementation is limited to software and services only (and any specifically denoted hardware). Any hardware, communications circuits, system software, or other third-party components not explicitly itemized herein or on related purchase documents are excluded.

Project Organization & Planning Deliverables (PO & PP)

Task PO 1: Project Management

Objective: Provide effective project management using industry standard methodologies including.

Responsibilities:

EIS will designate a Project Manager who will direct EIS's efforts and serve as the primary point of contact for the CCSO. The responsibilities of the EIS Project Manager include:

- a) Maintain project communications with the CCSO's Project Manager.
- b) Manage the efforts of EIS staff and coordinate EIS activities with the CCSO's project team members.
- c) Resolve conflicts and deviations affecting the Project Plan & Schedule.
- d) Monitor the project to ensure that support resources are available as scheduled and as identified in the project plan.
- e) Coordinate and oversee the installation of all licensed EIS/EIS application software.
- f) Review and administer change control procedures through the CCSO's Project Manager, commonly referenced as a "Change Request" (CR), issued by the EIS Project Manager.
- g) Conduct status meetings via telephone or email with the CCSO's Project Manager, as reasonably required, to discuss project status and prepare status reports as agreed upon.
- h) Provide timely responses to issues related to project progress raised by the CCSO's Project Manager.
- i) Working with the CCSO Project Manager, develop and maintain a Project Task List to identify project tasks and deadlines.

CCSO will designate a Project Manager who will direct CCSO's efforts and serve as the primary point of contact for the CCSO. The responsibilities of the CCSO Project Manager include:

- a) Maintain project communications with EIS's Project Manager.
- b) Identify the efforts required of CCSO staff to meet the CCSO's task requirements and milestones in the Statement of Work and Project Schedule.
- c) Review the preliminary Project Schedule with EIS's Project Manager and assist EIS in developing a detailed Project Schedule defining the detailed tasks and a schedule of EIS and CCSO responsibilities.
- d) Measure and evaluate progress against the Project Schedule.
- e) Monitor the project to ensure that CCSO support resources are available as scheduled.
- f) Attending status meetings with EIS's Project Manager.
- g) Provide timely responses to issues related to project progress raised by EIS's Project Manager.
- h) Liaison and coordinate with other CCSO agencies, other governmental agencies and the CCSO's contractors and 3rd party vendors.
- i) Review and administer change control procedures, hardware and software certification, and all related project tasks required to maintain the implementation schedule.
- j) Approve payments in a timely manner.

- k) Ensure that all appropriate CCSO personnel attend and actively participate in all project activities.
- l) Assign one or more personnel who will work with EIS staff as needed for the duration of the project, including at least one system administrator, one database administrator and a command staff representative from the Sheriff's department that can make policy decisions.
- m) Work with EIS personnel in designing and approving a project task list as mentioned in the EIS Project Manager Responsibilities.
- n) Provide building access for EIS personnel to all facilities where the system is to be installed during the project. Identification cards should be issued to EIS personnel if required for access to CCSO facilities. **Access must be available 24 hours a day during the course of this project with the required escorts when necessary.** EIS acknowledges that access to CCSO facilities will be governed by the CCSO's security and access requirements and will cooperate with the CCSO to ensure EIS staff and any subcontractor personnel adhere to CCSO access standards.
- o) Provide 7 X 24 X 365 secure remote access to system resources during the initial installation and configuration phases of the project.
- p) Provide adequate workspace for EIS personnel to include desks, chairs, worktables, telephone with long distance access, color printer access, and internet connections access is limited to CCSO policy, vendors must adhere.
- q) As applicable to EIS's installation, assume responsibility for all fees for licenses and inspections and for any delays associated with inspections due to the required permits.
- r) Provide reasonable care to prevent equipment exposure to contaminants that cause damage to the equipment or interruption of service. Ensure a safe work environment for EIS personnel. If problems are encountered with hazardous materials, EIS will immediately halt work and the CCSO will be responsible for the abatement of the problem or EIS and the CCSO will jointly come to a mutual agreement on an alternative solution. EIS will be excused from timely performance of its obligations pending such resolution.
- s) Provide CJIS certified staff and their EIS owned computers network access to the relevant servers for purposes of installation, configuration, and maintenance.

Dependencies:

Assignment of Project Managers.

Completion Criteria:

This task is considered complete when CCSO and EIS assign their designated Project Managers.

Task PO 2: Project Organization Meeting

Objective: Conduct Project Organization meeting with designated EIS and CCSO staff.

Task Description: Project Planning and Organization tasks include the establishment of the EIS and CCSO project managers, project team and the provision of a Project Kickoff/Organization Meeting. This activity also identifies and communicates specific project tasks to be undertaken by EIS and CCSO. Timeframes will be established for the development of related project management deliverables under this Statement of Work, including the Project Plan.

The initial project organization meeting is a facilitated work session designed to establish project organization and reporting and to set initial parameters on the overall project implementation. A key objective of this meeting is to provide implementation assistance to CCSO personnel and answer outstanding questions and concerns related to the project.

The objectives of this task are:

- To introduce all project participants and review roles of key participants.
- Review contractual requirements and overall scope of the project.
- Answer key customer questions and address concerns related to the project.
- Establish a clear chain of communication, authority and reporting procedure.
- Review resource and scheduling requirements.
- Review and collect interface data.
- Review the implementation procedures and establish a general timeline for the project to include any known administrative delays that may affect project implementation.
- Finalize Hardware Requirements to support the JMS and RMS system and peripheral applications.
- Site Tour.
- Acquire information sufficient to begin the development of the following project plans.
 - Implementation Plan
 - Responsibility Matrix
 - Training Plan
 - Acceptance Test Plan
 - Interface Plan
 - Conversion Plan

Dependencies:

Executed and accepted contract.

Completion Criteria:

This task is considered complete when the on-site Project Kickoff Session has been held with EIS and CCSO representatives in attendance.

Task PO 3: Hardware Requirements and Site Preparation Review

Objective: Validate and approve the CCSO’s hardware and third-party software requirements.

Task Description:

EIS will review the intended agency provided hardware. Server (if provided by agency), network platform and agency provided peripheral equipment with CCSO to verify that CCSO has met all the hardware requirements, operating system requirements, network, access points and third-party software for the JMS & RMS system(s). Task will be performed at the project organization meeting.

Responsibilities:

EIS will:

- a) Verify with CCSO personnel the recommended computer processor(s), operating system software, third-party software, all associated workstations, printers, communications, and related components.
- b) Verify with CCSO the network topology and configuration requirements.

- c) Prepare a final hardware and operating system software deliverables list (if required), thus amending Project Deliverables, as appropriate.
- d) Pre-plan installation activities with CCSO.
- e) Verify with CCSO the server installation and support processes utilized by the CCSO.
- f) Verify the provision of remote access to CCSO servers by EIS installation and Support staff.

CCSO will:

- a) Provide, upon request, information on existing hardware and operating system software components and terminal networks, as well as projected utilization statistics and other information as is reasonably required to validate final hardware requirements.
- b) Review the final hardware and operating system software configuration with the EIS project team.
- c) Order hardware as determined and notify EIS as to delivery and installation schedules.
- d) Certify the CCSO provided hardware is installed and ready for use as determined in the project organizational meeting.

Dependencies:

CCSO IT resources, including:

- Network/Network Security
- DBA
- Desktop Support
- Server Support

Completion Criteria:

This task is considered complete when the final hardware and operating system software configuration is complete and approved by the CCSO and EIS.

Task PO 4: Project Definition and JMS Functional Review

Objective: Review EIS JMS Functional Design and define CCSO Operational Requirements.

Task Description: EIS project staff will meet with CCSO assigned project team members and stakeholders to provide a project overview, to discuss project expectations, and to review intended outcomes as related to the Jail Management System (JMS). The purpose of this task is to review the functional capabilities of the software and contracted services to ensure that customer CCSO personnel understand the conceptual details of the software and have a grasp of the software’s operational parameters. EIS will discuss the intended use of each provided operational module with CCSO personnel, define extended system parameters and other information that will be required to allow EIS to configure the software for installation at the customer site. Review the CCSO operational procedures and identify any CCSO-specific requirements to meet general system level State Reporting requirements, local integration processes and other identified system operational requirements. Review data conversion approach.

This workshop provides an overview of the various JMS code tables and the requirements for gathering the data to build these files. Provide worksheets and review data import options to populate standardized tables. The session provides an overview of options available to CCSO for performing agency specific software tailoring and determining operational system parameters.

Responsibilities:

EIS will:

- a) Review the operational and business requirements of the CCSO.
- b) Conduct a review with CCSO of EIS JMS functionality based on current EIS JMS Design Specifications.
- c) Obtain, with CCSO's assistance, state standards and requirements applicable to State level Reporting.
- d) Summarize outstanding items and provide a definitive project schedule in an *Internal Reference Specification (IRS)*. Copies of this will be provided for the Agency and reviewed with Agency management to help ensure that the project is on track and that both parties have a firm understanding of the overall software configuration objectives.

CCSO will:

- a) Assign appropriate CCSO personnel to attend the functional review session.
- b) CCSO's JMS database administrator will attend the functional review session.
- c) Aid EIS in obtaining the state standards and requirements.
- d) Provide acceptance of EIS JMS Design specifications and general system reporting specifications.
- e) Participate in the review of the EIS JMS functionality, based on the current or proposed EIS Design Specifications.
- f) Collect and provide all system table and validation data values, unless specified otherwise by mutual agreement.

Dependencies:

1. Deployed EIS JMS Server software to CCSO production machines.
2. Deployed JMS workstation software to workstations to be used during the review session.

Completion Criteria:

This task is considered complete when EIS has provided the on-site JMS Review Workshop session and provided CCSO with a documented review of EIS JMS functionality, state reporting requirements, and identified enhancements discovered as part of the workshop as a project software configuration document.

Task PO 5: Conduct JMS Software Configuration Workshop

Objective:

Conduct an Installation/Configuration workshop with the CCSO Project Team to install, conduct system administrator training, configure, and verify the software components. As part of the implementation phase of the project EIS will conduct a configuration administrative workshop with CCSO's designated system administrative personnel. This workshop provides an overview of the various JMS code tables and the requirements for gathering the data to build these files. Provide worksheets and review data import options to populate standardized tables. The session provides an overview of options available to CCSO for performing CCSO specific system tailoring and determining operational software parameters. Following the initial configuration workshop CCSO project team will be assigned a set of additional configuration tasks to be completed throughout the configuration phase.

Task Description:

Software Configuration and CCSO administrator training is normally conducted in a workshop at the CCSO or series of workshops. A single workshop is preferred and is normally one week. The purpose of this workshop is to

ensure all systems and components are installed, assist the CCSO with configuring JMS code tables, and system administrator training to selected CCSO personnel that will administrator the JMS system. This workshop is not intended for live operation. The identified system administrators will validate the operation of the system and the initial data conversion.

At the end of this workshop, the key CCSO staff should be familiar with the use and configuration of the system. Key CCSO staff should be able to complete security setup, table maintenance, and other end-user configuration tasks necessary for live operation.

Responsibilities:

EIS will:

- a) Ensure all JMS components are installed and functioning properly.
- b) Train selected CCSO system administrators and other key staff in the theory, use, and configuration of the system.
- c) Review with CCSO project team the specific JMS application functionality and code tables for which information must be collected to configure the system and assist the CCSO with configuration.
- d) Assist CCSO with testing and validating data conversion for completeness and accuracy.
- e) Provide CCSO with a Workshop schedule sufficient time agreed to by both parties in advance of the workshop.

CCSO will:

- a) Identify JMS system administrators and key project personnel to attend the workshop and ensure their availability.
- b) Identify data sources for all system code tables and other CCSO operational parameters.
- a) System administrators become comfortable and familiar with JMS system administration, table configuration, system security, workflow, and operational principles.

Dependencies:

1. Completion of the system functional review.
2. Deployed JMS software to CCSO production machines.
3. Deployed JMS workstation software to workstations to be utilized by during the review session.

Completion Criteria:

This task is considered complete when EIS has concluded the JMS Configuration Workshop and identified to the CCSO the configurable options for the JMS application.

Task PO 6: RMS Project Definition for Warrants & PO Functional Review

Objective: Review EIS Warrants and Protection Orders Functional Design and define CCSO Operational Requirements.

Task Description: EIS project staff will meet with CCSO assigned project team members and stakeholders to provide a project overview, to discuss project expectations, and to review intended outcomes as related to the Warrants Management sub-system (component within the EIS RMS environment). The purpose of this task is to review the functional capabilities of the system software and contracted services to ensure that customer CCSO personnel understand the conceptual details of the systems and have a grasp of the systems operational

parameters. EIS will discuss the intended use of each provided operational warrants module with CCSO personnel, define extended system parameters and other information that will be required to allow EIS to configure the system for installation at the customer site. Review the CCSO operational procedures and identify any CCSO-specific requirements to meet general system level State integration requirements, local integration processes and other identified system operational requirements. Review data conversion approach.

This workshop provides an overview of the various RMS and Warrants code tables and the requirements for gathering the data to build these files. Provide worksheets and review data import options to populate standardized tables. The session provides an overview of options available to CCSO for performing agency specific system tailoring and determining operational system parameters.

Responsibilities:

EIS will:

- a) Review the operational and business requirements of the CCSO.
- b) Conduct a review with CCSO of EIS Warrants functionality based on current EIS Warrants Design Specifications.
- c) Obtain, with CCSO's assistance, state standards and requirements applicable to State level Integration (ORLEDS).
- d) Summarize outstanding items and provide a definitive project schedule in an *Internal Reference Specification (IRS)*. Copies of this will be provided for the Agency and reviewed with Agency management to help ensure that the project is on track and that both parties have a firm understanding of the overall software configuration objectives.

CCSO will:

- a) Assign appropriate CCSO personnel to attend the functional review session.
- b) CCSO's System database administrator will attend the functional review session.
- c) Aid EIS in obtaining the state standards and requirements.
- d) Provide acceptance of EIS Warrants Design specifications and general system reporting specifications.
- e) Participate in the review of the EIS Warrants functionality, based on the current or proposed EIS Design Specifications.
- f) Collect and provide all system table and validation data values, unless specified otherwise by mutual agreement.

Dependencies:

- 1. Deployed EIS Application and Database Server software to CCSO production machines.
- 2. Deployed Agency workstation software to workstations to be used during the review session.

Completion Criteria:

This task is considered complete when EIS has provided the on-site Warrants Module Review Workshop session and provided CCSO with a documented review of EIS Warrants functionality, state integration requirements, and identified enhancements discovered as part of the workshop as a project software configuration document.

Task PO 7: Conduct Warrants & PO System Configuration Workshop

Objective:

Conduct an Installation/Configuration workshop with the CCSO Project Team to install, conduct system administrator training, configure, and verify the system components. As part of the implementation phase of the project EIS will conduct a configuration administrative workshop with CCSO's designated system administrative personnel. This workshop provides an overview of the various Warrants and Protection Orders code tables and the requirements for gathering the data to build these files. Provide worksheets and review data import options to populate standardized tables. The session provides an overview of options available to CCSO for performing CCSO specific system tailoring and determining operational system parameters. Following the initial configuration workshop CCSO project team will be assigned a set of additional configuration tasks to be completed throughout the configuration phase.

Task Description:

System Configuration and CCSO administrator training is normally conducted in a workshop at the CCSO or series of workshops. A single workshop is preferred and is normally one to two days. The purpose of this workshop is to ensure all systems and components are installed, assist the CCSO with configuring Warrants code tables, and system administrator training to selected CCSO personnel that will administrator the Warrants system. This workshop is **not** intended for live operation. The identified system administrators will validate the operation of the system and the initial data conversion.

At the end of this workshop, the key CCSO staff should be familiar with the use and configuration of the system. Key CCSO staff should be able to complete security setup, table maintenance, and other end-user configuration tasks necessary for live operation.

Responsibilities:

EIS will:

- a) Ensure all Warrants and protection Orders components are installed and functioning properly.
- b) Train selected CCSO system administrators and other key staff in the theory, use, and configuration of the system.
- c) Review with CCSO project team the specific Warrants and Protection Orders application functionality and code tables for which information must be collected to configure the system and assist the CCSO with configuration.
- d) Assist CCSO with testing and validating data conversion for completeness and accuracy.
- e) Provide CCSO with a Workshop schedule sufficient time agreed to by both parties in advance of the workshop.

CCSO will:

- a) Identify Warrants & PO system administrators and key project personnel to attend the workshop and ensure their availability.
- b) Identify data sources for all system code tables and other CCSO operational parameters.
- c) System administrators become comfortable and familiar with Warrants & PO system administration, table configuration, system security, workflow, and operational principles.

Dependencies:

1. Completion of the system functional review.
2. Deployed RMS Warrants software to CCSO production machines.
3. Deployed RMS Warrants workstation software to workstations to be utilized by during the review session.

Completion Criteria:

This task is considered complete when EIS has concluded the Warrants & PO Configuration Workshop and identified to the CCSO the configurable options for the Warrants and PO applications.

Task PO 8: Project Definition and Civil Process Functional Review

Objective: Review EIS Civil Process Functional Design and define CCSO Operational Requirements.

Task Description: EIS project staff will meet with CCSO assigned project team members and stakeholders to provide a project overview, to discuss project expectations, and to review intended outcomes as related to the Civil Process Management sub-system (component within the EIS RMS environment). The purpose of this task is to review the functional capabilities of the system software and contracted services to ensure that customer CCSO personnel understand the conceptual details of the systems and have a grasp of the systems operational parameters. EIS will discuss the intended use of each provided operational Civil Process module with CCSO personnel, define extended system parameters and other information that will be required to allow EIS to configure the system for installation at the customer site. Review the CCSO operational procedures and identify any CCSO-specific requirements, local integration processes and other identified system operational requirements. Review data conversion approach.

This workshop provides an overview of the various Civil Process code tables and the requirements for gathering the data to build these files. Provide worksheets and review data import options to populate standardized tables. The session provides an overview of options available to CCSO for performing agency specific system tailoring and determining operational system parameters.

Responsibilities:

EIS will:

- a) Review the operational and business requirements of the CCSO.
- b) Conduct a review with CCSO of EIS Civil Process functionality based on current EIS Civil Process Design Specifications.
- c) Identify specific changes to be implemented as part of Civil "Single Form" development services (detailed as a specific deliverable in the development section of in this SOW)
- d) Summarize outstanding items and provide a definitive project schedule in an Internal Reference Specification (IRS). Copies of this will be provided for the Agency and reviewed with Agency management to help ensure that the project is on track and that both parties have a firm understanding of the overall software configuration objectives.

CCSO will:

- a) Assign appropriate CCSO personnel to attend the functional review session.
- b) CCSO's System database administrator will attend the functional review session.
- c) Aid EIS in obtaining the state standards and requirements.
- d) Provide acceptance of EIS Civil Process Design specifications and general system reporting specifications.
- e) Participate in the review of the EIS Civil Process functionality, based on the current or proposed EIS Design Specifications.
- f) Collect and provide all system table and validation data values, unless specified otherwise by mutual agreement.

Dependencies:

1. Deployed EIS Application and Database Server software to CCSO production machines.
2. Deployed Agency workstation software to workstations to be used during the review session.

Completion Criteria:

This task is considered complete when EIS has provided the on-site Civil Process Module Review Workshop session and provided CCSO with a documented review of EIS Civil Process functionality, state integration requirements, and identified enhancements discovered as part of the workshop as a project software configuration document.

Task PO 9: Conduct Civil Process & Civil.Web System Configuration Workshop

Objective:

Conduct an Installation/Configuration workshop with the CCSO Project Team to install, conduct system administrator training, configure, and verify the system components. As part of the implementation phase of the project EIS will conduct a configuration administrative workshop with CCSO's designated system administrative personnel. This workshop provides an overview of the various Civil Process code tables and the requirements for gathering the data to build these files. Provide worksheets and review data import options to populate standardized tables. The session provides an overview of options available to CCSO for performing CCSO specific system tailoring and determining operational system parameters. Following the initial configuration workshop CCSO project team will be assigned a set of additional configuration tasks to be completed throughout the configuration phase.

Task Description:

System Configuration and CCSO administrator training is normally conducted in a workshop at the CCSO or series of workshops. A single workshop is preferred and is normally one to two days. The purpose of this workshop is to ensure all systems and components are installed, assist the CCSO with configuring Civil Process code tables, and system administrator training to selected CCSO personnel that will administrator the Civil Process system. This workshop is **not** intended for live operation. The identified system administrators will validate the operation of the system and the initial data conversion. Session will include a review of the Civil.Web mobile application and configuration options available to the agency.

At the end of this workshop, the key CCSO staff should be familiar with the use and configuration of the system. Key CCSO staff should be able to complete security setup, table maintenance, and other end-user configuration tasks necessary for live operation.

Responsibilities:

EIS will:

- a) Ensure all Civil Process components are installed and functioning properly.
- b) Ensure all Civil.Web components are installed and functioning properly on agency provided web server.
- c) Train selected CCSO system administrators and other key staff in the theory, use, and configuration of the system.
- d) Review with CCSO project team the specific Civil Process application functionality and code tables for which information must be collected to configure the system and assist the CCSO with configuration.
- e) Assist CCSO with testing and validating data conversion for completeness and accuracy.

- f) Provide CCSO with a Workshop schedule sufficient time agreed to by both parties in advance of the workshop.

CCSO will:

- a) Identify Civil Process system administrators and key project personnel to attend the workshop and ensure their availability.
- b) Identify data sources for all system code tables and other CCSO operational parameters.
- c) System administrators become comfortable and familiar with Civil Process system administration, table configuration, system security, workflow, and operational principles.

Dependencies:

1. Completion of the system functional review.
2. Deployed Civil Process software to CCSO production machines.
3. Deployed Civil Process workstation software to workstations to be utilized by during the review session.

Completion Criteria:

This task is considered complete when EIS has concluded the Civil Process Configuration Workshop and identified to the CCSO the configurable options for the Civil Process application.

Project Plan (PP)

Task PP 1: Project Plan

Objective: EIS Project Manager will develop a Project Plan and deliver it to the CCSO for approval.

Task Description:

The EIS Project Plan shall describe tasks, estimated duration, task dependencies and estimated completion dates for tasks defined within the Statement of Work. The EIS Project Plan shall describe the elements and define associated deliverables and resources. Adjustments to the project plan will be on-going. The EIS Project Manager will write and submit a detailed Project Plan to the CCSO for approval. The Project Plan will include the following:

- A project synopsis with key objectives and goals of the new systems.
- A reiteration of the project organization and staffing.
- An abbreviated list of contract deliverables as outlined in this SOW.
- An initial implementation schedule showing key milestones and installation sequences.
- A training plan that will lay out the training requirements in hours, schedule, training facilities, and responsibilities. The actual scheduling of personnel will be done on a date closer to the Training and Live Operations phase.
- A data conversion plan.
- A cut-over plan for go-live operations.

Responsibilities:

EIS Will:

- a. The EIS Project Manager will write the Project Plan and deliver it to the CCSO Project Manager for review and approval.

CCSO Will:

- a. The CCSO Project Manager will review and approve the Project Plan.

Dependencies:

Completion Criteria:

This task is complete upon acceptance of the initial project plan by CCSO project manager.

Task PP 2: Acceptance Test Plan(s)

Objective: EIS Project Manager will assist the CCSO project manager with the development of an “Acceptance Test Plan”. The successful completion of the Acceptance test plan will constitute “Final” system acceptance.

Task Description:

The EIS Project Manager assist the CCSO in the development of the system acceptance criteria and the “Acceptance Test Plan” that will detail the procedures to be utilized for the acceptance tests, test plans will include:

- a) Installation Acceptance Test Plan – Certification of the initial baseline software deployment.

- b) Functional Test Plan – Certification that the system is configured according to deployment specifications, including CCSO specific configurations and customizations.
- c) Interface Test Plan – Certification that the deployed interface is operational according to the development and deployment specifications (provided per interface). Acceptance criteria are defined within each CCSO approved interface development specification.

Responsibilities:

EIS Will:

- a. The EIS Project Manager will assist the CCSO Project Manager in the development of the referenced plans for review and approval.
- b. Coordinate all EIS resources as required in the development of the related plans.

CCSO Will:

- a. The CCSO Project Manager will review and approve the Acceptance Test Plan.

Dependencies:

Completion Criteria:

This task is considered complete upon mutual acceptance of the written Test Plan by EIS and CCSO project manager(s).

Hardware, Platform and 3rd Party Deliverables Tasks (HW)

Task HW 1: Review CCSO Production Server Hardware

Objective: Review and accept the production CCSO provided server configuration as ready to receive application software.

Task Description:

Objective involves reviewing the server environment provided to ensure appropriate integration with CCSO network, installation and configuration of appropriate system software, including Server OS's, Service packs, SQL database software, MSMQ, .NET frameworks, IIS and other components as specified by EIS installation group. Task includes reviewing with the CCSO the server environment to be provided to ensure appropriate scaling to support agency's operations under expected loads and integration requirements related to integrating the system into the agency's existing network and computing infrastructure. Scaling requirements will be based on anticipated use metrics and address resource scaling (CPU, RAM, Storage, etc.) estimations. Integration will address integration with CCSO network, installation and configuration of appropriate system software, including Server OS's, Service packs, SQL database software, MSMQ, .NET frameworks, IIS, interface endpoints and other components as specified by EIS installation group. The deliverable associated with this task will be a server platform definition that will address the allocated hardware resources, operating systems, supporting software and connectivity requirements associated with the Production and Test server platform(s).

Access for EIS must be granted by CCSO to attach to provided servers with administrative privileges using EIS owned computers by EIS CJIS certified staff. EIS technical staff will verify the configured components deployed on servers. Specific tests will be performed to assess component configuration. If components are missing or improperly configured, EIS installation group will notify CCSO of the deficiency and coordinate with the CCSO a resolution plan. Due to the nature of the proposed VM deployment module, EIS is unable to address issues related to systems and configuration below the VM Client OS level.

Responsibilities:

EIS will:

- a) Provide consulting assistance and server requirements for the proposed EIS system. Review server configurations install applications and services and test configuration.
- b) Verify and accept server configuration as "Ready for Use".

CCSO will:

- a) Install and configure the servers into a production environment.
- b) Provide necessary information to support system resource identification and scaling, including (but not limited to): Anticipated usage levels, agency level network integration requirements, agency security policies impacting system operations, user level policy requirements, agency provided hardware, WAN/LAN configurations, Interface/Integration endpoints, etc.
- c) Install and configure all Server hardware, OS's, OS Service packs, .NET Frameworks, SQL database software and other components as specified by EIS installation group.
- d) Provide administrative access to EIS installation team to resources provided by the county to be utilized within the JMS system.
- e) Be available to address and answer questions, modify configurations, and modify security permissions if required during the installation.

Dependencies:

1. CCSO provided server hardware must be installed and configured for use within the CCSO's network environment.
2. All CCSO provided server-side software is loaded and configured for use.
3. EIS technical/installation group must be granted access to the servers at an administrative level.

Completion Criteria:

This task is complete when EIS certifies as "Ready to Use" the production server systems provided by the CCSO.

Task HW 2: Install the County-provided Microsoft SQL Server Database Instance

Objective: The objective of this task is to install the supporting Microsoft SQL Server Database software instance on the production server(s) and certify the Microsoft SQL Server DB configuration as ready to use.

Task Description:

County IT to install the County-provided Microsoft SQL Server Database software to on County provided database server hardware. The SQL Server database software will be installed on production and test servers by County IT utilizing Mixed-Mode access, and full permission rights will be granted to EIS installation personnel. EIS installation staff will configure the supporting Microsoft SQL Server Database software with the system data tables and permission set required to support the delivered PS.NET application software (and specified County configurations), on the designated County-provided server.

Responsibilities:

EIS will:

- a) Install the baseline JMS, RMS Core, Warrants module and Civil Process and other licensed modules database schemas within this configuration.
- b) Test the initial operation of the baseline database subsystem and provide a status report to the CCSO's project manager upon completion.
- c) Provide written certification of successful installation.

CCSO will:

- a. Install and configure designated database server hardware on County's network (Hardware).
- b. Provide access to CCSO -provided hardware components to EIS installers. CCSO provided hardware and/or software must meet EIS recommended specifications and configuration.
- c. Be available to address an answer question, modify configurations, and modify security and provisioning if required during the installation.
- d. Develop a standard backup routine of the SQL database with EIS staff. Test and implement.

Completion Criteria:

This task will be completed upon the installation and configuration of the Microsoft SQL Server Database software on the database server and certified by EIS as ready to use as indicated in the implementation plan and accepted by CCSO.

NOTES:

All required network protocol connectivity, firewalls and web services required to attach the workstations and other system servers to the SQL Server database must be provided by the County and must be operational prior to onsite installation by EIS technicians.

Task HW 3: Review JMS Training and Test Server Hardware

Objective: Review and accept the training/test level, CCSO provided server configuration as ready to receive application software. As part of the project EIS will install an isolated test/training instance of the system software on county provided servers.

Task Description:

Objective involves reviewing the training/testing server environment provided to ensure appropriate integration with CCSO network, installation and configuration of appropriate system software, including: Server OS's, Service packs, SQL database software, MSMQ, .NET frameworks, IIS and other components as specified by EIS installation group.

Access for EIS must be granted, and systems verified in the same manner as Task HW1.

Responsibilities: Same as Task HW1

Dependencies: Same as Task HW1

Completion Criteria:

This task is considered complete when EIS certifies as "Ready to Use" the test/training server systems provided by the CCSO.

Software Delivery Tasks & Deliverables (SFTW)

Software delivery tasks are associated with each of the software components purchased by the CCSO as specified in the software license grant. Software denoted in this deliverable section is comprised of retail level Commercial off the Shelf (COTS), Standard release software developed and distributed by EIS. Interfaces, software customizations and project level development services are defined in other portions of the SOW. Terms of the Software license grant are specified in the Lines agreement executed between CCSO and EIS. Delivery of software is performed as follows:

On-premises Deployment

1. Software to be delivered on standard exchange media to agency via mail, courier, or parcel service.

OR

2. Deployed directly to agency server(s) via remote access.

EIS Managed Hosted Platforms

1. Software deployed directly to EIS Hosted Environment or Customer provided hosted platform via remote access with notice of delivery provide to CCSO.

Deliverable includes software components (media and software license) including applicable documentation (software manuals).

Task SFTW 1-8: Deliver JMS Application & Server Software

Objective: Deliver standard release JMS Server software, JMS Workstation software and JMS supporting Software, including applicable JMS software licenses, as purchased by the CCSO and specified in the Contract. JMS will be provided as a single production instance, supporting the CCSO Adult Correctional Facility, and a single test/training instance.

Task Description:

Complete the delivery of standard release JMS server software, the JMS Workstation Application software, and all applicable JMS and supporting software licenses as indicated in the Contract. This includes all software components (media), including applicable documentation (electronic software manuals) as listed in the purchase contract. Licensed COTS software include:

SFTW 1: JMS Modules include the following. *(Review specific task detailed in this document for configuration (ICFG) and Development (DEV) modifications included)*

Master Inmate Management (JMS Master Inmate)

Booking

Inmate Property

Jail Incident Reporting

Jail Housing

Inmate Classification/Assessment

Inmate Sentencing

Jail Log

Inmate Movement

Inmate Meal Restrictions

Inmate Release

Inmate Schedule

Inmate Transport

Jail Reporting

Inmate Visitation

Professional Visitation

Provide standard, general release, professional visitation module.

Inmate Mugshot
Inmate Lineup
Jail Issue

SFTW 2: Deliver Advanced Imaging Sub-system Software

integrated image license can be used to support live, direct capture within the inmate property module. Once deployed to the site the imaging components can be used in the JMS system (Inmate Imaging, Inmate Property & Facility visitors). Use of the software does require the provision of specific image capture hardware by CCSO.

SFTW 3: Deliver Dashboard Hub (ASP) Software

The Dashboard Hub provides the core ASP integrated dashboard platform used within jail, and includes 2 standard dashboard templates, including 1) the Booking/intake dashboard and 2) the release dashboard. Additionally, the CCSO has the option to purchase additional dashboard configurations as a customized dashboard layout (specified in SOW ICFG 5)

SFTW 4: Deliver JMS Pocket JMS Software

Delivery of PocketJMS Webservices as purchased by the CCSO and specified in the Contract. Configuration and access grant to download PocketJMS at either 1) for Android based devices access is granted through the Google Play store and access token granted to agency, or 2) for Apple based devices access is granted through the Apple store and access token granted to agency.

SFTW 5: Deliver JMS Pre-Booking Server Software

Complete the delivery of standard JMS Pre-Booking server software as indicated in the Contract delivered to the CCSO at the location specified in the contract.

SFTW 6: Deliver EIS Text-to-Data Engine Software

Provide the standard version EIS Text-to-Data engine core software to CCSO. As part of the CCSO project, the engine will be utilized to populate specified application data screens with data retrieved from bar code scans of the designated state driver's license credentials. The template(s) are used to extract and map driver's license credential data to application screens within the JMS programs. The specific template interface(s) & mapping details are described in INTER 14 of this document.

Note: The Text to Data engine is an interface component providing a system level parsing service. The engine is used to convert serial text to data elements that can be used within the EIS applications to reduce or eliminate manual data entry. The Text to Data engine can accept data from text-based documents (e.g., ORLEDS returns), scannable credentials (e.g. Drivers Licenses) or other serialized text data sources. The Text to Data engine is a required core component in addition to the desired set of data mapping templates.

SFTW 7: Deliver Jail Public Web Viewer

Provide the standard version EIS Public Access Web Viewer providing a public facing agency configurable web site displaying inmate demographic data as configured by the agency (i.e. only current inmates, no mugshots, etc).

SFTW 8: Deliver EIS Notification Services

Provide the standard version EIS Notification Services engine core software to CCSO. As part of the CCSO project, the engine will be utilized to generate automated notifications routed to subscribing recipients via email. The Notification Engine includes 2 standard templates 1) booking/intake that will transmit via email a message when triggered by the creation of a booking record for a specified person, and 2) release that will transmit via email a message when triggered by the release of an inmate. Additional notification templates can be purchased by the agency and defined per agency requirements.

Notification template(s) are used to define a triggering event occurring in the JMS and to generate a pre-formatted message to the subscribing user. The standard delivery mechanism is via email through the **CCSO's** email service. The **CCSO** will be required to provide EIS with a no-reply email account for use within the JMS to support notification services, incident report forwarding notifications and SSRS automated report delivery. The specific template triggering and message details will be defined in the template development/configuration specifications.

SFTW 8a: Deliver EIS Notification Services 10 pack of Notification Templates

Responsibilities:

EIS will:

- a) Deliver all contracted software components, including applicable documentation (software manuals), as listed in Contract.

CCSO will:

- a) Accept software delivery and acknowledge receipt of EIS provided components.

Completion Criteria:

This task will be completed when the JMS software distribution set and third-party software components as listed in contract, are delivered to the CCSO at the location specified in the contract and accepted by CCSO as defined in the acceptance plan.

Task SFTW 9-12: Deliver RMS Warrants and Civil Application Software

Objective: Deliver standard release RMS Server software, RMS Workstation software, Civil Workstation Software and RMS supporting Software, including applicable RMS software licenses, as purchased by the County and specified in the Contract.

Task Description:

Complete the delivery of standard release RMS server software, the RMS Workstation Application software, and all applicable RMS and supporting software licenses as indicated in the Contract. This includes all software components (media), including applicable documentation (electronic software manuals) as listed in the purchase contract.

RMS Modules include the following. *(Review specific task detailed in this document for configuration and modifications to be developed)*

RMS Administration Modules and Master Indexes Modules

EIS Standard, general release RMS administrative modules, RMS system index with search application for MNI (Master Name Index) and MVI (Master vehicle Index). Included administrative Index management application.

SFTW 9: Warrants Management Module

EIS to provide standard, general release, system module.

SFTW 10: Protection Orders Management Module

EIS to provide standard, general release, system module.

SFTW 11: Civil Process Management Module

EIS to provide standard, general release, Civil.NET Civil Process Management system for use within the County. Specific configurations and customizations to be provided as detailed in the system configuration section of this document. This is an agency license for the EIS Civil application, with functionality including subpoena tracking, eviction processing, and property seizure and sales workflow. Agency-wide client application licenses are included.

SFTW 12: Civil.Web Application

EIS to provide standard, general release, Civil.Web - Civil Process Management system for use within the County.

Responsibilities:

EIS will:

- a) Deliver all software components, including applicable documentation (software manuals), as listed in the contract.

CCSO will:

- a) Accept software delivery and acknowledge receipt of EIS provided components.

Completion Criteria:

This task will be completed when the RMS software distribution set and third-party software components as listed in the contract, are delivered to the County at the location specified in the contract and accepted by the County as defined in the acceptance plan.

Task SFTW 13: Deliver M2 Server Software

Objective: EIS will deliver the primary M2 software modules on standard exchange media. This includes all software components (media and software license) including applicable documentation (software manuals).

Task Description:

M2 operates as the system message switch and is utilized in support of system interfaces, including ORLEDS. Deliver M2 Server software, ORLEDS Adapter software, JMS-M2 interface and supporting Software required to connect to the M2 message switch, including applicable M2 software licenses, as purchased by the CCSO and specified in the Contract.

SFTW 13a.M2 Data Switch Server Software – JMS Adapter

*M2 is a general communication data switch utilized throughout the JMS system. M2 will be deployed to support an interfaced node supporting a direct connection to the State for **ORLEDS/NCIC** traffic and will be used to route **ORLEDS/NCIC** responses within the JMS. Specific **ORLEDS** interface components are listed in the “**ORLEDS**” interface description contained in the interface section of this SOW. **ORLEDS** broadcast and general notification services will not be provided through the M2 interface.*

SFTW 13b.M2 Data Switch Server Software – RMS Adapter

*M2 is a general communication data switch utilized throughout the JMS system. M2 will be deployed to support an interfaced node supporting a direct connection to the State for **ORLEDS/NCIC** traffic and will be used to route **ORLEDS/NCIC** responses within the JMS. Specific **ORLEDS** interface components are listed in the “**ORLEDS**” interface description contained in the interface section of this SOW. **ORLEDS** broadcast and general notification services will not be provided through the M2 interface.*

Responsibilities:

EIS will:

- a) Deliver all software components including applicable documentation (software manuals), as listed in Contract.

CCSO will:

- a) Accept software delivery and acknowledge receipt of EIS provided components.

Completion Criteria:

This task will be completed when M2 software distribution set and third-party software components as listed in contract, are delivered to the CCSO at the location specified in the contract.

Notes:

M2 is a general communication data switch utilized throughout the JMS system. M2 will be deployed to support an interfaced node supporting a direct connection to the State for ORLEDS /NCIC traffic. Specific ORLEDS interface components are listed in the "ORLEDS" interface description contained in the interface section of this SOW. ORLEDS broadcast and general notification services will not be provided through the M2 interface.

Task SFTW 14-15: Deliver EIS Biometric Engine with Single Digit Fingerprint Verification Engine Software

Objective: Deliver EIS Biometric Engine and Fingerprint Verification module software licenses and workstation software as purchased by the CCSO and specified in Contract.

Task Description:

Provide the standard version of the EIS Biometric Engine (Server Component), Fingerprint Verification module software licenses software (Client Licenses – Site), Facial Recognition module software licenses (Client Licenses – Site) as listed in the Contract. EIS installation staff will install and configure the supporting EIS Biometric Engine software with the appropriate configuration options and permission set required to support the delivered PS.NET application software, on the designated County-provided server.

SFTW 14: Deliver EIS Biometric Engine core.

Provide the standard version EIS Biometric Engine Core Software. The EIS Biometric Engine operates as the core server component supporting the various biometric capabilities available within the EIS product Suite. The Biometric engine provides the base processing and template management component, to which an assortment of biometric matching subsystems can attach, including facial recognition and single digit fingerprint. The biometric engine is required in addition to the desired set of biometric.

SFTW 15: Deliver EIS Biometric Engine Fingerprint Identification sub-system.

Provide the standard version EIS Biometric Fingerprint Recognition Software. The JMS Fingerprint Verification engine provides a biometric enrollment and matching capability designed to quickly identify subjects based on the

inmate's fingerprint characteristics. The fingerprint verification technology is deployed as an integrated part of the JMS and accessible from the operational screens in the JMS.

Responsibilities:

EIS will:

- a) Deliver all software components including applicable documentation (software manuals), as listed in Contract.
- b) Provide purchased Biometric Engine and supporting finger matching algorithms.

CCSO will:

- a) Accept software delivery and acknowledge receipt of EIS provided components.
- b) Provide access to CCSO fingerprint database.

Dependencies:

- 1. None

Completion Criteria:

This task will be completed when EIS Biometric Engine and Fingerprint Verification module software distribution set as listed in contract, are delivered to the CCSO at the location specified in the contract.

Installation and Configuration Services

Note: EIS will normally install the JMS software remotely prior to onsite configuration. The initial installation will be to production level servers and will include the approximation of NCIC and State required code table values. EIS will additionally provide a first cut data conversion including the JMS data migrated from the legacy systems for initial evaluation. EIS will then schedule an Installation/Configuration Workshop or series of workshops to install final system components, conduct system administrator training, configure the system, verify initial data conversion, and verify system operation. CCSO will be responsible to provide all system hardware unless specifically noted in the Contract or this Statement of Work.

Software Configuration Deliverables (ICFG)

Task ICFG 1: JMS Configuration and Development

Objective: EIS to provide product standard configuration services to the core JMS product as part of the deployment to meet CCSO operational objectives.

Task Description:

EIS will provide the following system configuration/customizations to the core JMS product as currently identified with CCSO. As part of the installation activities, EIS will work with the CCSO to develop a final system configuration/customization specification. All configurations will be incorporated into the base JMS product utilizing the configuration options intrinsic to the software.

Functional Modifications Include:

Standard JMS Configuration

- 1. Definition of the CCSO workflow via the module tree presented within the primary JMS system.
- 2. Definition of the required/desired intake/booking validation rule indicators provided on the inmate booking complete screen.
- 3. Definition of the required/desired release validation rule indicators provided on the inmate release screen.

4. Configure inmate release dashboard/listing to include the CCSO required release data clearance elements within the current feature set of the application. Configure release dashboard to display select subset (up to 8) of validation rule compliance indicator (Pass/Fail) within the current supported system ability.
5. Configure inmate Booking/Intake dashboard/listing to include the CCSO required booking validation elements within the current feature set of the application. Configure Booking dashboard to display select subset (up to 8) of validation rule compliance indicator (Pass/Fail) within the current supported system ability.
6. Configure inmate property Intake & Release receipt(s) supporting capture of electronic signature in accordance with CCSO defined inmate receipting output.
7. Configure Oregon standard sentence calculation parameters in accordance with OR statutory guidelines. Configure and deploy initial sentence calculation tool within the sentence screen. Calculation will include sentence parameters associated with the charge and apply the good time and other standard calculated values in accordance with State of Oregon, Clackamas County or local judicial Standards.
8. Deploy bail statement report to reflect CCSO's bail grouping and value calculation protocol.
9. Provide a specific set of Clackamas County Billing reports, to include the agency specific custody billing parameters including daily rate and daily rate assignment defined by the CCSO.
10. Configure inmate initial classification and Reclassification questionnaires and risk assessment responses within the current configuration options.
11. Configure inmate intake questionnaires and risk assessment responses within the current configuration options.

Accounting (inmate)

1. None – Will not be utilized as agency is utilizing Keefe (Inmate Banker).

Pre-Booking

1. Deploy and configure standard prebook application.
2. Configuration/development of agency defined printable booking/arrest affidavit document for implementation in the prebook module.
3. Configure inmate Pre-Booking questionnaires responses within the current configuration options.
4. Configuration/development of agency defined jail search results SSRS document for general user level in the prebook module.
5. Configuration/development of agency defined jail search results SSRS document for administrative user level in the prebook module.

Bail/Bond Screen

1. Deploy bail statement report to reflect CCSO's bail grouping and value calculation protocol.

Sentencing and Sentence Calculation

1. Configure and deploy initial sentence calculation tool within the sentence screen. Calculator will include sentence parameters associated with the charge and apply the

good time and other standard calculated values in accordance with State of Oregon Standards.

Inmate Release

1. Configure inmate release dashboard/listing to include the CCSO required release data clearance elements within the current feature set of the application within the current configuration options.
2. Definition of the required/desired release validation rule indicators provided on the inmate release screen within the current configuration options.

Inmate Programs

1. No agency specific configuration currently identified.

Inmate Contact

1. No agency specific configuration currently identified.

Inmate Visitation

1. No agency specific configuration currently identified.

Inmate Housing

1. No agency specific configuration currently identified.

Jail and Inmate Logs

1. No agency specific configuration currently identified.

Professional Visitation

1. No agency specific configuration currently identified.

Inmate Transportation

1. No agency specific configuration currently identified.

Inmate Incident Reporting

1. Modification to incident reporting module are defined in the related (DEV) section of this SOW.

Inmate Classification

- i. Configure inmate classification questionnaires and risk assessment responses within the current configuration options.

Jail Administrative Dashboard

1. Configure and deploy 1 standard administrative dashboard (SSRS RDL).

Additional JMS Configuration

1. Definition of the CCSO workflow via the module tree presented within the primary JMS system.

Responsibilities:

EIS will:

- a. Set into the production system the above configuration changes.

CCSO will:

- a. Review and accept above listed configuration/development changes.
- b. Ensure that necessary certifications, approvals, and other related issues will be completed by the CCSO at least ninety (90) calendar days prior to scheduled interface work.
- c. Ensure that the necessary technical support is made available for installation, testing and demonstration of the interfaces.
- d. Identify in writing each discrepancy between subsystem functionality and the provided EIS configuration/programming documentation.

Dependencies:

1. CCSO acceptance of EIS provided configuration/development changes.

Completion Criteria:

This task is considered complete when the JMS configuration and development enhancements have been deployed to the CCSO production instance of the JMS, has passed acceptance testing, and accepted by the CCSO project manager.

Task ICFG 2: Jail Report Development

Objective: Develop and deliver departmental report/output and system printouts as determined in accordance with the contract and as agreed to during the system configuration review. Deliver up to 40 agency specific customized reports/printout generated from the JMS. If additional report packages are purchased, they will be included in this sectional delivery.

Task Description:

EIS will review the existing reports and printouts generated by the EIS JMS product and assist the agency in finding solutions for discrepancies in required reports and printouts not existing in the system. EIS will provide up to 20 reports/printouts to be defined by CCSO for inclusion on the product under the terms of the agreement. 20 Additional reports/printouts pre-purchased by CCSO.

40 SSRS Agency specific customized reports

Responsibilities

EIS will:

- a) Schedule and participate in meetings and/or teleconferences to define the requirements of the departmental report/output and system printouts.
- b) Advise CCSO staff on report/printout options to meet requirements.

CCSO will:

- a) Evaluate the JMS product existing report/printout options and notify EIS of discrepancies for new/changes to the allotted 40 provided.

Completion Criteria:

This task will be completed when the listed departmental (40) report/output and system printouts have been created, deployed, verified, and accepted by CCSO. Custom report development does not need to be completed

prior to project installation completion and the delivery of the allocated 20 reports are not tied to system delivery completion. The agency may hold over report development past go-live for future needs.

Task ICFG 3: RMS & Civil Report Development

Objective: Develop and deliver departmental report/output and system printouts as determined in accordance with the contract and as agreed to during the system configuration review. Deliver 6 agency specific customized reports/printout generated from the RMS and Civil. If additional report packages are purchased, they will be included in this sectional delivery.

Task Description:

EIS will review the existing reports and printouts generated by the EIS RMS product and assist the agency in finding solutions for discrepancies in required reports and printouts not existing in the system. EIS will provide 6 additional reports/printouts pre-purchased by CCSO.

6 SSRS Agency specific customized reports for Civil and Warrants

Responsibilities

EIS will:

- a) Schedule and participate in meetings and/or teleconferences to define the requirements of the departmental report/output and system printouts.
- b) Advise CCSO staff on report/printout options to meet requirements.

CCSO will:

- b) Evaluate the RMS and Civil product existing report/printout options and notify EIS of discrepancies for new/changes to the allotted 6 provided.

Completion Criteria:

This task will be completed when the listed departmental (6) report/output and system printouts have been created, deployed, verified, and accepted by CCSO. Custom report development does not need to be completed prior to project installation completion and the delivery of the allocated 6 reports are not tied to system delivery completion. The agency may hold over report development past go-live for future needs.

Task ICFG 4: RMS Warrants, Civil and Protection Orders Configuration and Development

Objective: EIS to provide product standard configuration services to the core RMS licensed modules and Civil application as part of the deployment to meet CCSO operational objectives.

Task Description:

EIS will provide the following system configuration/customizations to the core RMS product as already discussed with County. As part of the installation activities, EIS will work with the County to develop a final system configuration/customization specification. All modifications will be incorporated into the base RMS product.

RMS Configuration Functions:

1. Definition and configuration of the County RMS workflow within the primary RMS system.

EIS will:

- a. Provide the above configuration changes.

CCSO will:

- a. Review and accept above listed configuration/development changes.
- b. Provide clear and concise configuration directives to EIS Project manager.
- c. Identify in writing each discrepancy between subsystem functionality and the provided EIS configuration/programming documentation.

Dependencies:

1. County acceptance of EIS provided configuration/development changes.

Completion Criteria:

This task is considered complete when the RMS configuration and development enhancements have been deployed to the CCSO production instance of the RMS and accepted by the CCSO.

Task ICFG 5: JMS Dashboard/Display

Objective: Develop or configure 10 custom display forms for the CCSO that replace the content included in the existing “Dashboard” display application deployed within the jail, including;

- a) Booking dashboard
- b) Supervisor dashboard
- c) Population Manager
- d) Unit Dashboard
- e) Clackamas County Records
- f) To Be Determined

NOTES:

The current dashboard displays have been developed by Clackamas County IT staff and deployed within the jail environment for use by jail staff. The existing dashboards use an automated update capability and refresh the displayed information at regular intervals.

Task Description: Provide development of/or configuration services to create a reasonable representation of the existing dashboard applications, supporting the 10 display options. The EIS delivered component will be capable of automatically refreshing the displayed information on an agency defined interval, be capable of being displayed in a full screen mode on an external monitor and operating as an independent application outside of the JMS workstation. The final functional processing will be defined within the development specification provided by EIS for CCSO approval.

Responsibilities

EIS will:

- a) Conduct the application functionality discovery phase of the development by working with CCSO subject matter expert(s) to identify and document required component functionality.
- b) Create a development specification document detailing the deliverable.
- c) Develop/configure component per approved development specification.
- d) Deploy and test component into production environment.

CCSO will:

- a) Approve Interface specifications prior to commencement of development work.
- b) Provide subject matter expert(s) with sufficient expertise related to the functional requirements of the existing component. The subject matter expert(s) will work with EIS during the development specification creation and Sign-Off phases.

Dependencies:

1. None.

Completion Criteria:

This task is considered complete when the designated dashboard displays have been deployed to the productions system and are capable of operating in accordance with the approved design specification.

Task ICFG 6: Install and Configure Licensed EIS Software on the provided Test/Training servers.

Objective: The objective of this task is to install and configure the baseline application software and licenses on the designated CCSO provided Test/Training servers as designated in the implementation plan in accordance with the finalized system configuration. Deliver and test the primary software modules on the equipment installed/provided by the CCSO at CCSO facility. The test instance(s) will be configured to provide an independent version of the core applications for test and training purposes. The instance will be fully isolated from the production environment and will not be able to support extended system functions and interfaces to 3rd party systems.

Test/Training environments to include:

1. ICFG 6.a – JMS Test/Training
2. ICFG 6.b – RMS (Warrants & Protection Orders) Test/Training
3. ICFG 6.c – Civil Process Test/Training

Responsibilities: Same as Task ICFG 1 & ICFG 3

Dependencies: Same as Task ICFG 1 & ICFG 3

Task Description:

The training/test servers must mirror the system software environment deployed to the production servers. Objective involves reviewing the training/testing server environment provided to ensure appropriate integration with County network, installation and configuration of appropriate system software, including Server OS's, Service packs, SQL database software, MSMQ, .NET frameworks, IIS and other components as specified by EIS installation group. Initial System configurations will be built on the production level servers and copied to the test/training instance as part of the system go-live transition. EIS will synchronize the test/training environments at agency request as part of the semi-annual software update services – up to 2 times per year. Synchronization may include the replication of the agency's production database to the Test/Training instance – including configuration setting and live system data.

Access for EIS must be granted, and systems verified in the same manner as Task HW1.

Responsibilities:

EIS will:

- a) Install and test, with the CCSO's assistance, the licensed JMS software to the designated test/training servers.
- b) Provide the CCSO with the training necessary to prepare CCSO personnel with the ability to deploy the Test Instance client software on additional workstations.
- c) Test the initial operation of the baseline system(s) and supporting subsystems.
- d) Certify that the configuration is complete and ready to use.
- e) Provide deployment instructions and data communication settings required to deploy workstation software.

CCSO will:

- a) Perform site and hardware preparation as described and certify that Test/Training Servers are ready to receive application software.
- b) Ensure all CCSO provided hardware meets minimum required specifications.
- c) Ensure all required network protocol connectivity, firewalls and web services required to attach the applications to the SQL Server database, are provided by the CCSO and certified as operational prior to onsite installation by the EIS technicians.
- d) Deploy the application software either over the network or with the assistance of EIS staff to all desired workstations.
- e) Review system configuration and report any discrepancies to EIS Installation staff within 5 days of EIS certification.

Completion Criteria:

This task is considered complete when EIS certifies as "Ready to Use" the test/training server systems provided by the County.

System Preparation

Project Development Tasks

Interface Development and Deployment Tasks (INTR)

All system interfaces will be developed and deployed in accordance with the EIS interface specifications accepted by the CCSO. Once accepted, the development interface specification will be the final document and be incorporated into the contract forthwith. All interfaces are subject to dependencies and are partially reliant on factors beyond the control of EIS. As such, the deliverable items related to all interfaces are directly dependent on the availability of external resources (connections to foreign systems, data, and other external components). EIS interface will be installed; however, EIS has no control over other vendors and their timeline/ability to bring their side of the interface operational. Delays related to the required dependencies are not the responsibility of EIS.

All interfaces with other products will be completed as quickly as possible, however without the cooperation of the third-party software vendors, implementation could be delayed. This would not be the responsibility of EIS and outside the scope of the SOW.

In the event current vendors change between execution of the contract and implementation a change order will be required for the new interface due to existing interfaces having been quoted based on EIS having existing experiences and our interfaces. While EIS will attempt to use existing interfaces for new requirements, if possible, EIS reserves the right to require additional cost for interface changes post contract.

EIS will develop the following agreed upon interfaces as part of this project. The responsibilities for each interface incorporate the following supporting activities from each party:

EIS:

- a) Develop interface development specification detailing interface for CCSO Acceptance.
- b) Develop software service/application that functions in accordance with the Interface Development Specification.
- c) Certify to the CCSO that the interface is ready for integration testing.
- d) Assist the CCSO in testing the vendor interface if possible.
- e) Review any discrepancies that are identified by the CCSO.
- f) Provide software or documentation corrections as needed to correct the discrepancies prior to EIS Final Certification.
- g) Certify EIS delivered interface for production operation.

CCSO:

- a) Provide, on request, currently existing information, record layouts and documents necessary to establish interfaces with all local and remote systems and facilities at least ninety (90) days prior to interface installation.
- b) Review and accept the EIS provided interface programming specification in accordance with contract specifications.
- c) Assume responsibility for any modifications or additions to any existing or non-EIS supplied systems required to enable them to support the interfaces, as defined in the Functional System Description, Change List, and interface control documents.

- d) Provide and install all communications lines and equipment according to the contract documents.
- e) Provide all required liaison support with the vendors/agencies and EIS project management required to support the interfaces.
- f) Ensure that necessary certifications, approvals and other related issues will be completed by the CCSO at least ninety (90) calendar days prior to scheduled interface work.
- g) Ensure that the necessary technical support is made available for installation, testing and demonstration of the interfaces.
- h) Conduct test procedures and verify all inter-system communications between installed EIS systems and non-EIS systems to ensure conformance with the approved standard document and interface control documents.
- i) Identify in writing each discrepancy between subsystem functionality and the provided EIS interface documentation and interface control documents.
- j) Work with EIS to identify the type of correction needed to ensure that each subsystem conforms to the EIS standard documents and interface control documents.

Summary Listing of Interface Deliverables

INTR 1: JMS TO GTL/VIAPATH (INMATE TELEPHONE) INTERFACE

INTR 2: JMS TO LIVESCAN (IDEMIA) INMATE DATA INTERFACE EXPORT TRANSACTION

INTR 3: LIVESCAN (IDEMIA) TO JMS DATA RESPONSE INTERFACE IMPORT

INTR 4: EIS JMS TO (COMMISSARY) KEFFE INTERFACE

INTR 5: JMS EXPORT TO INMATE MEDICAL (NAPHCARE) INTERFACE

INTR 6: INMATE MEDICAL (NAPHCARE) TO JMS ALERTS & DIETARY INTERFACE IMPORT

INTR 7: JMS EXPORT TO BODYSCAN (B-SCAN) BODY SCANNER

INTR 8: COURT MS (ODYSSEY) TO JMS DOCKET SCHEDULE DATA IMPORT

INTR 9: JMS STATE BENEFITS INFORMATION EXPORT INTERFACE

INTR 10: JMS MARK43 ARREST DATA IMPORT INTERFACE

INTR 11: JMS TO SERENIC (SYSLOGIC) VICTIM NOTIFICATION EXPORT INTERFACE

INTR 12: JMS TO CJC PSC SCORING SYSTEM

INTR 13: JMS SSA INFORMATION EXPORT

INTR 14: DL DATA SCAN TO JMS NAMES

INTR14.1 State of Oregon Driver's License data map

INTR14.2 State of Washington Driver's License data map

INTR 15: JMS TO ORLEDS

INTR15.1: ORLEDS Message Keys

INTR 16: COURT (ODYSSEY) TO WARRANT INTERFACE

Task INTR 1: JMS to GTL (Inmate Telephone) Interface

Objective: Provide a scheduled data transfer export package to GTL that includes the demographic, housing location information and LOP (Loss of Privilege) (or select JMS alerts) indicator(s) for all inmates currently active within the Clackamas County jail.

Task Description:

GTL is the current inmate telephone vendor (and provides the video visitation system used by the CCSO), and the CCSO is seeking to minimize duplication of data entry into the JMS across multiple systems. The interface is a one-way push of inmate and inmate housing location data to the Securus system. The exported JMS data will be utilized by GTL for the purpose of managing inmate telephone accounts within the jail.

The data export package will be formatted to conform to the existing data export standards currently utilized between EIS and GTL. The interface can be set to operate on a CCSO defined interval during installation. EIS will receive no acknowledgement returned from GTL as part of this transaction. **An EIS development specification detailing the interface will be provided to the CCSO for acceptance prior to the deployment of the EIS interface component.**

Please note that it is the CCSO's responsibility to coordinate/contract with GTL to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from GTL will be the sole responsibility of the CCSO.

EIS will:

- a) Deploy existing GTL export interface.

CCSO will:

- a) Coordinate installation with GTL representative.
- b) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- c) Ensure interface dependencies have been addressed.

Dependencies:

1. CCSO acceptance of EIS provided interface programming specification.
2. Current Interface specification reflecting expected data format and transaction control protocol from GTL
3. Network Access to the required transaction/interchange point via the Clackamas County Network.

Completion Criteria:

This task is considered complete when the system interface can extract the inmate data as designated in the development specification and writing the properly formatted export data to the designated transaction FTP location.

EIS will not sub-contract development work on behalf of GTL.

Task INTR 2: JMS to Livescan (Idemia) Interface Export

Objective: Replacement of an existing Interface between Livescan and the legacy JMS. Provide a data directional transfer of inmate demographic, arrest and charge data from the JMS to the County's existing Livescan system. Interface will be provided for the adult correctional facility.

Task Description:

The County is seeking to minimize duplication of data entry into the JMS across multiple systems. The interface is a one-way push of inmate and arrest data to the Livescan system. Currently there is a single Livescan system housed in the main booking area of the Clackamas County Jail.

EIS has proposed to deploy the existing EIS JMS/ Idemia Export interface that has been quoted for this project. That interface will be implemented for this project. In the event that changes are required to that interface a change order and possible fee will be included to cover the change to the proposed interface.

Please note that it is the County’s responsibility to coordinate/contract with Livescan vendor to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from Livescan will be the sole responsibility of the County. An EIS development specification detailing the interface will be provided to the County for acceptance prior to the deployment of the EIS interface component.

Responsibilities

EIS:

- a) Deploy the EIS JMS/Livescan interface.

Dependencies:

- 1. County acceptance of EIS provided interface programming specification.
- 2. Network Access to the required transaction point on the County Network.
- 3. Assist the County in testing the Livescan interface.

Completion Criteria:

This task is complete when the system interface is functioning as described above and accepted by County in accordance with the system acceptance test.

Note: EIS will not sub-contract development work on behalf of Livescan.

Task INTR 3: Livescan to JMS Interface Import

Objective: Provide a data transfer import into the JMS of inmate information returned from Livescan to include the state assigned identifiers, such as FBI, SID and local Identification fields.

Task Description:

EIS has an existing interface that can be implemented and provided to Livescan for implementation. This will allow EIS to import changes to the FBI/SID/AFIS/Local ID from Livescan to EIS JMS.

All costs (if any) associated with the provision of the interface from Livescan will be the sole responsibility of the County. An EIS development specification detailing the interface will be provided to the County for acceptance prior to the deployment of the EIS interface component.

EIS:

- a) Deploy existing livescan import interface.

Dependencies:

- 1. Network Access to the required transaction point on the County Network.
- 2. Assist the County in testing the Livescan interface.

Completion Criteria:

This task is complete when the system interface is functioning as described above and accepted by County in accordance with the system acceptance test.

Task INTR 4: EIS JMS to Keefe Interface

Objective: Provide a scheduled data transfer export package to the Keefe system that includes the demographic, housing location and LOP (Loss of Privilege) indicator for all inmates currently active within the Clackamas County jail.

Task Description:

Keefe is the current inmate commissary and inmate accounting vendor, and the CCSO is seeking to minimize duplication of data entry into the JMS across multiple systems by having data entered into the JMS transferred to the Keefe system. The interface is a one-way push of inmate and inmate housing location data to the Keefe system.

The data export package will be formatted to conform to the data export standards currently provided by EIS related to Keefe. The interface can be set to operate on County defined interval during installation or on a specified triggering event. EIS will receive no acknowledgement returned from Keefe as part of this transaction. An EIS development specification detailing the interface will be provided to the County for acceptance prior to the deployment of the EIS interface component.

EIS has proposed to deploy the existing EIS JMS/Keefe Export interface that has been quoted for this project. That interface will be implemented for this project. In the event that changes are required to that interface a change order and possible fee will be included to cover the change to the proposed interface.

Please note that it is the CCSO's responsibility to coordinate/contract with Keefe to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from Keefe will be the sole responsibility of the CCSO.

EIS will:

- b) Deploy existing Keefe export XML interface.

CCSO will:

- d) Coordinate installation with Keefe representative.
- e) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- f) Ensure interface dependencies have been addressed.

Dependencies:

1. CCSO acceptance of EIS provided interface programming specification.
2. Current Interface specification detailing the existing EIS-Keefe interface.
3. Network Access to the required transaction/interchange point via the Clackamas County Network.

Completion Criteria:

This task is considered complete when the system interface can extract the inmate data as designated in the development specification and writing the properly formatted export data to the designated transaction point via the Clackamas network.

Note: EIS will not sub-contract development work on behalf of Keefe.

Task INTR 5: JMS to NaphCare Interface

Objective: Provide a data transfer export package to the NaphCare system that includes the demographic, housing location and relevant inmate information for each active inmate active in the jail at the time of transaction.

Task Description:

NaphCare is the current inmate medical provider (System) within the CCSO jail. The interface is intended to provide a subset of inmate data entered into the JMS to the NaphCare system. The interface is a one-way push of inmate and inmate housing location data to the NaphCare system. The interface is intended to update the NaphCare system when the inmate is activated within the JMS, when a housing location change occurs and when the inmate is released from custody. There is no HIPAA data exchanged.

EIS has proposed to deploy the existing EIS JMS/Naphacare Export interface that has been quoted for this project. That interface will be implemented for this project. In the event that changes are required to that interface a change order and possible fee will be included to cover the change to the proposed interface.

The data export package will be formatted to conform to the data export standards mutually agreed to between EIS and the NaphCare vendor. The interface can be set to operate on a CCSO defined interval during installation. EIS will receive no acknowledgement returned from NaphCare as part of this transaction. An EIS development specification detailing the interface will be provided to the CCSO for acceptance prior to the commencement of interface programming.

Please note that the initial interface scope has been derived from information provided by the CCSO during requirement statements. It is the CCSO's responsibility to coordinate/contract with NaphCare to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from NaphCare will be the sole responsibility of the CCSO.

EIS will:

- c) Deploy NaphCare export interface.

CCSO will:

- g) Coordinate installation with NaphCare representative.
- h) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW and defined in project plan & schedule documents.
- i) Ensure interface dependencies have been addressed.

Dependencies:

1. CCSO acceptance of EIS provided interface programming specification.
2. Current Interface specification reflecting expected data format and transaction control protocol from CCSO for NaphCare interface.
3. Network Access to the required transaction/interchange point via the CCSO Network.

Completion Criteria:

This task is considered complete when the system interface is capable of extracting the inmate data as designated in the development specification and writing the properly formatted export data to the designated transaction point via the CCSO network or service entry point defined in the interface specification.

Interface will be formally acknowledged as complete by CCSO in accordance with the system acceptance test.

Note: EIS will not sub-contract development work on behalf of NaphCare.

Task INTR 6: NaphCare to JMS Interface

Objective: Import medical alerts and Dietary restrictions from data provided from NaphCare.

Task Description:

NaphCare is the current inmate medical provider (System) within the CCSO jail. The interface is intended update the inmates booking record with dietary restrictions recorded in NaphCare and/or alerts associated with the inmate’s medical record. There is no HIPAA data exchanged.

NaphCare will provide the EIS interface service with a data package containing sufficient inmate identifiers to establish a link between the NaphCare data with the inmate’s active booking record in JMS. The data package must contain sufficient information to identify the nature of the update – either dietary or alert. Dietary updates will be posted to the inmate’s meal restriction record on the active booking. Alerts will be posted to the inmate alert portion of the inmates active booking record. An EIS development specification detailing the interface will be provided to the CCSO for acceptance prior to the commencement of interface programming.

Please note that the initial interface scope has been derived from information provided by the CCSO during requirement statements. It is the CCSO’s responsibility to coordinate/contract with NaphCare to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from NaphCare will be the sole responsibility of the CCSO.

EIS will:

- a) Scope and develop the NaphCare import interface.
- b) Deploy NaphCare import interface.

CCSO will:

- a) Coordinate installation with NaphCare representative.
- b) Manage responsibilities as enumerated in the general “Interface Task” section of the SOW and defined in project plan & schedule documents.
- c) Ensure interface dependencies have been addressed.

Dependencies:

- 1. CCSO acceptance of EIS provided interface programming specification.
- 2. Current Interface specification and sample data files reflecting expected data format and transaction control protocol from CCSO for NaphCare interface.
- 3. Network Access to the required transaction/interchange point via the CCSO Network.

Completion Criteria:

This task is considered complete when the system interface is capable accepting a standard data package from NaphCare and perform the creation of the appropriate updates to the inmates active booking record as defined in the interface specification.

Interface will be formally acknowledged as complete by CCSO in accordance with the system acceptance test.

Note: EIS will not sub-contract development work on behalf of NaphCare.

Task INTR 7: JMS Export to B-Scan Body Scanner

Objective: Provide a one-way data transfer export package to the B-Scan bodyscan device that includes inmate information to include base inmate name and demographic information.

Task Description:

The B-Scan bodyscan device is used for all incoming inmates and is required to maintain exposure and scan records for each person scanned. The JMS to B-Scan interface is intended to pass inmate data currently in the JMS system to the B-Scan scanner in order to eliminate redundant data entry efforts as part of the bodyscan procedure. The JMS to B-Scan interface will extract inmate name and demographic data from the active JMS booking record and transport to the B-Scan interface endpoint for use. The JMS will produce a standardized data export file in accordance with the mutually agreed upon data formatting definition. This data package will contain inmate identifying, name and demographic information. The EIS export process will be triggered by either an automated remote request via a web service call or by a user activation feature provided within the JMS client – to be determined as part of final specification development. Each file exported from the JMS will contain data related to a single inmate. Once triggered the EIS export process will extract the relevant inmate information, determined by the specific inmate identifier or booking number used, and prepare a standardized data package. The data will be delivered to the B-Scan scanned via a web service response, network file share or other agreed to exchange method.

The data export package will be formatted to conform to the data export standards agreed to between EIS and B-Scan. EIS will receive no acknowledgement returned from B-Scan as part of this transaction. **An EIS development specification detailing the interface will be provided to the CCSO for acceptance prior to the deployment of the EIS interface component.**

Please note that it is the CCSO's responsibility to coordinate/contract with B-Scan to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from B-Scan will be the sole responsibility of the CCSO.

EIS will:

- a) Work with B-Scan to define an agreeable data format and transfer method.
- b) Develop extraction and transaction code.
- c) Deploy and test export transactions on production system.

CCSO will:

- a) Coordinate installation with B-Scan representative.
- b) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- c) Ensure interface dependencies have been addressed.

Dependencies:

1. CCSO acceptance of EIS provided interface programming specification.
2. Availability of interface support on the B-Scan system.
3. Finalization of expected data format and transaction control protocol from B-Scan.
4. Network Access to the required transaction/interchange point via the Clackamas County Network or B-Scan provided remote access point (Webservice, FTP or SFTP).

Completion Criteria:

This task is considered complete when the system interface can extract the inmate data as designated in the development specification and write the properly formatted export data to the designated transaction location (or other data exchange endpoint).

EIS will not sub-contract development work on behalf of B-Scan.

Task INTR 8: Odyssey (Tyler Courts) Schedule Import Interface

Objective: Provide an interface to Import court scheduling data provided by the Odyssey court system and associate with the listed inmates as a scheduled.

Task Description:

The Odyssey Interface is intended to load the daily court appearance schedule into the JMS associated with the inmates expected to appear in court for the day. The Odyssey data is intended to create a scheduled event within the JMS for each inmate included in the extract. The scheduled event will be utilized by the transport unit to coordinate the transportation of inmates to the relevant district court. The interface will be a one way import of data from the Odyssey file into the JMS schedule, EIS will return no acknowledgement to the Odyssey as part of this transaction.

EIS will provide a process that will load the data provided by the Odyssey court system and associate the court schedule with the active inmate record as a scheduled event. The EIS interface process will load the provided data file and parse the inmate and docket data into defined data elements. The interface process will generate an inmate schedule event reflecting the court and time within the inmate's schedule based on the provided docket number and provided inmate information. Any records/schedules included in the Odyssey file that cannot be associated with an active inmate in the jail will be ignored by the import process. An EIS development specification detailing the interface will be provided to the CCSO for acceptance prior to the commencement of interface programming.

It is the CCSO's responsibility to coordinate/contract with Odyssey (Tyler) to ensure that the court data is available and ready for use. All costs (if any) associated with the provision of the interface from Odyssey (Tyler) will be the sole responsibility of the CCSO.

Dependencies:

1. CCSO acceptance of EIS provided interface programming specification.
2. Current Interface specification reflecting expected data format and transaction control protocol from Odyssey.
3. Network Access to the required transaction/interchange point via the CCSO Network.

Completion Criteria:

This task is considered complete when the system interface is capable of extracting the inmate court schedule data from the received Odyssey data file, and successfully posts the Court and time information to the inmate's schedule, and is viewable within the JMS within the inmate's record as designated in the development specification.

Interface will be formally acknowledged as complete by CCSO in accordance with the system acceptance test.

Note: EIS will write to an existing published interface provided from the CCSO / Odyssey (Tyler) for the purpose of this interface. EIS will not sub-contract development work on behalf of CCSO / Odyssey (Tyler).

Task INTR 9: JMS Inmate Employment “EOD” information Export

Objective: Provide JMS standard export report designed to generate a properly formatted data package containing inmates incarcerated within the jail during the user specified data range.

Task Description:

EIS will deploy a data export standard report designed to generate a properly formatted data package containing inmates incarcerated within the jail during the user specified data range. Once executed, the process will generate a data file containing the relevant inmate information and write the file to a local file. The file can then be accessed and transmitted to the state of Oregon Employment division as required.

EIS will:

- a) Standard report export to local file.

CCSO will:

- a) None

Dependencies:

- 1. None.

Completion Criteria:

This task is considered complete when the system export process is capable of extracting the JMS current inmate custody information based on the user provided date range criteria from the JMS, prepare a properly formatted data file in accordance with the file specification and successfully write the data file to a local hard drive or UNC path.

Task INTR 10: Mark 43 Pre-Booking information to JMS Interface

Objective: Provide an interface that will facilitate the transfer of Arrest/Pre-Booking data collected by the Mark 43 application into the JMS pre-booking module.

Task Description:

Provide a mutually agreeable (Mark 43, CCSO and EIS) interface that allows the Pre-Booking data entered by arresting officer into the Mark 43 product to transfer into the EIS JMS Pre-Booking module for use by jail staff. The primary intent is to eliminate duplicate entry of the relevant data by CCSO staff and capitalize on any existing interfaces specifications that might be relevant to this endeavor.

The interface will be provided as a uni-directional import of data from Mark 43 to the JMS Pre-Booking queue per the interface specification. The data import package will be formatted to conform to the data export standards as agreed to between EIS and Mark 43, and as defined in the EIS programming specification. EIS will not return an acknowledgement of receipt of data to the Mark 43 system as part of this transaction. An EIS development specification detailing the interface will be provided to the CCSO for acceptance prior to the commencement of interface programming.

Please note that the initial interface scope, and related pricing, has been derived based on a set of assumptions related to the Mark 43 data transfer capabilities. In the initial information the interface is specified as a transactional interface utilizing a Web Service with standard XML file to pass Pre-Booking data from Mark 43 application to the JMS Pre-Booking queue. It is the CC’s responsibility to coordinate/contract with Mark 43 to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from Mark 43 will be the sole responsibility of the CCSO.

Dependencies:

1. Agreement with Mark 43, CCSO and EIS on interfaces details.
2. CCSO acceptance of EIS provided interface programming specification.
3. Network Access to the required transaction/interchange point via the CCSO Network.

Completion Criteria:

This task is complete when the system interface is capable of extracting the pre-booking data provided by Mark 43 and committing the pre-booking data to the EIS JMS Pre-Booking queue and viewable by user within the Pre-Booking application as designated in the development specification.

Interface will be formally acknowledged as complete by CCSO in accordance with the system acceptance test.

Note: EIS will not sub-contract development work on behalf of Mark 43.

Task INTR 11: JMS to SysLogic Interface

Objective: JMS export of in custody inmate data to SysLogic (Serenic) victim notification system. The JMS will provide periodic data export to

Task Description:

SysLogic is the current state level victim notification system for the State of Oregon. The JMS to SysLogic interface is intended provide innate and release data for inmates being held in the jail and being released from custody. The JMS will provide regular updates to the SysLogic system via the existing web service interface.

On a periodic, configurable interval, the JMS will prepare a properly formatted data package and submit to the SAVIN360 NIEM JSON webservice. The EIS data submission request conforms to and is validated against the JSON schema defined in the 'SubmitJailEvent-Schema.json' file published in the SysLogic interface specifications. An EIS development specification detailing the interface will be provided to the CCSO for acceptance prior to the commencement of interface deployment.

Please note that the initial interface scope has been derived from information provided by the CCSO during requirement statements. It is the CCSO's responsibility to coordinate/contract with SysLogic to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from SysLogic will be the sole responsibility of the CCSO.

EIS will:

- a) Scope and develop the SysLogic import interface.
- b) Deploy SysLogic import interface.

CCSO will:

- a) Coordinate installation with SysLogic representative.
- b) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW and defined in project plan & schedule documents.
- c) Ensure interface dependencies have been addressed.

Dependencies:

1. CCSO acceptance of EIS provided interface programming specification.

2. Current Interface specification and sample data files reflecting expected data format and transaction control protocol from CCSO for SysLogic interface.
3. Network Access to the required transaction/interchange point via the CCSO Network.

Completion Criteria:

This task is considered complete when the system interface is capable accepting a standard data package from SysLogic and perform the creation of the appropriate updates to the inmates active booking record as defined in the interface specification.

Interface will be formally acknowledged as complete by CCSO in accordance with the system acceptance test.

Note: EIS will not sub-contract development work on behalf of SysLogic.

Task INTR 12: CJC Checklist Interface

Objective: Provide an interface to the state hosted CJC checklist classification system to receive inmate classification and rating assignment generated in the State’s system and updated to the JMS with the “Felony” rating returned by the CJC tool.

Task Description:

UI component installed on the JMS classification screen to initialize access to the State of Oregon CJC application. Once initiated the JMS will send the inmates SID identified to the CJC risk tool and waits for the system response. When the system response is received the EIS interface process imports the risk rating returned from the “Felony” risk segment returned and post to the inmate’s classification record.

EIS will:

- a) Configure, deploy and test the CJC interface.

County will:

- a) Ensure connection to the CJC webservice endpoint is available from the system application server and designated workstations operating in the jail environment.

Dependencies:

1. Availability of an interface between the 2 systems and data connections available.

Completion Criteria:

This task is considered complete when the system interface process is capable of extracting the JMS current inmate SID data and transmit to the CJC system interface endpoint and receive the rating response from the CJC data system and successfully write the rating response to the active inmates classification file.

Task INTR 13: JMS SSA information Export

Objective: Provide JMS standard export function designed to generate a properly formatted SSA data package containing inmates incarcerated within the jail during the user specified data range.

Task Description:

EIS will deploy the standard SSA export function accessible within the JMS management utilities.

EIS will:

- a) Standard SSA report export to local file.

CCSO will:

- b) None

Dependencies:

- 1. CCSO acceptance of EIS provided interface/export specification.

Completion Criteria:

This task is considered complete when the system export process is capable of extracting the JMS current inmate custody information based on the user provided date range criteria from the JMS, prepare a properly formatted data file in accordance with the file specification and successfully write the data file to a local hard drive or UNC path.

Task INTR 14: DL Data Scan to JMS Names

Objective: Provides data entry capability into the designated JMS names screen from data encoded into the designated Driver’s License credential eliminating the need for the users to perform manual data entry into JMS data screens associated with persons.

Task Description:

EIS to deploy the EIS Text to Data Engine and 2 State DL processing templates, including:

- a. State of Oregon Driver’s License data map
- b. State of Washington Driver’s License data map

Data Screens supported include:

- a. Inmate Identification Form
- b. Professional Visitors Form
- c. Inmate Contact form
- d. Visitors Form

NOTE: TEXT TO DATA ENGINE & DL CREDENTIAL MAPPING TEMPLATES

The engine is used to convert serial text to data elements that can be users within the EIS applications to reduce or eliminate manual data entry. The Text to Data engine will accept data from scannable credentials (e.g. Drivers Licenses) and create a parsed data collection with the ability to map the individual data items to data entry fields presented on selected JMS person screens. A detailed specification will be prepared on the details of this feature. However, only data present in the encoded ID card and/or return data is an option for parsing and screen population.

The DL credential to data capability is intended to reduce or eliminate direct data entry whenever a scannable credential is available, such as a state driver’s license. The EIS software in conjunction with an appropriate scanning device (bar code or magnetic stripe) is capable of translating data encoded within the credential, and populating data screens within the JMS using the received information. Credential encoded data formats are typically unique and will require specific interface mapping templates for each credential. The mapping templates process the incoming encoded data and populate the designated data fields within the EIS applications.

EIS will:

- a) Deploy the licensed EIS Text to Data engine.
- b) Prepare data mapping templates for the referenced credentials.

CCSO will:

- a) Provide supported scan hardware devices to the designated workstations.
- b) Manage responsibilities as enumerated in the general “Interface Task” section of the SOW.

- c) Ensure interface dependencies have been addressed.

Dependencies:

1. Provision and configuration of EIS Supported USB scan devices.

Completion Criteria:

This task is considered complete when on an enabled data screen, the user can successfully scan either a WA State of OR State driver’s license and have the related person information appear in the application form fields.

Task INTR 15: ORLEDS Interface MKE’s

Objective: Provide ORLEDS/NCIC software adapter within the M2 data switch and supporting a defined set of message keys (MKE’s) used for inquiry transactions with to ORLEDS through the State of Oregon’s data switch. Provided message keys will be associated with entity records contained within the targeted JMS and RMS systems and include a defined sub-set of ORLEDS transactions. Keys will be embedded within the Jail entity forms (Persons and vehicles) and within the RMS Warrants and Protection Orders (Persons) and provide return routing to the initiating user. The system includes the standard ORLEDS data entry and Inquiry adapters installed on the main M2 data switch, along with the JMS and RMS integration adapters used to publish data forms and data mapping within the associated system applications.

Task Description:

The interface will extract relevant data, where available, from the enabled JMS and RMS data screens to populate the provided Message forms as part of the ORLEDS request, eliminating redundant data entry. Within the JMS and RMS modules, any authorized user can select the related transaction type from the enabled form. The application will open the selected ORLEDS mask and populate the mask with the relevant data previously entered into the JMS or RMS record. The user selected the appropriate ORLEDS message key and enters any additional data required (or optional) related to the specified key. When complete the user selects the submit button, and the message is passed to the M2 gateway for processing. The message is formatted, submitted to the State and the return is received by the switch and routed back to the user for viewing. Inquiry transactions can support the following types of messages, specific supported message keys are document in attachment:

1. Query
2. Entry (Entry, Cancel, Clear, Modify transactions)
3. Supporting as indicated

JMS. Within JMS will be available related to inmate, facility visitor and professional visitor records. Interface requests will be processed through the M2 data switch which provides the ORLEDS adapter and returns will be routed to the requesting user via the M2 routing queue.

The embedded ORLEDS function is intended to reduce or eliminate the duplicate data entry related to processing ORLEDS inquiry transactions for inmate, facility visitor and professional visitors. ORLEDS specific inquiry message formats will be provided and embedded within the JMS. Standard keys include: General Person Warrant Query (QW) and Criminal History (QFQ). User interface ORLEDS functions will be provided on the following screens:

- a. Inmate Information
- b. Professional visitors
- c. Visitation Scheduling
- d. Contact
- e. Vehicles

RMS. Within RMS message keys will be provided to support standard persons, vehicle, property transactions as specified in this section. Interface requests will be processed through the M2 data switch which provides the ORLEDS adapter and returns will be routed to the requesting user via the M2 routing queue.

The embedded ORLEDS function is intended to reduce or eliminate the duplicate data entry related to processing ORLEDS inquiry transactions from data contained in the RMS including; Warrants, Protection Orders, ORLEDS specific inquiry and entry message formats will be provided and embedded within the RMS. User interface ORLEDS functions will be provided on the following Modules:

- a. Warrant - Persons and Vehicle
- b. Protection Order - Persons and Vehicle

Inquiry Functions: Includes the standard set of inquiry transactions (Message Keys) embedded within the JMS and RMS. Requires base M2 Switch and ORLEDS adapter(s). Additional (optional) message keys can be added as needed on a T & M basis. Requires connection to the State provided by CCSO.

The ORLEDS query keys will be defined for JMS and RMS screens separately.

Entry Transactions: The proposed application provides an entry transaction to ORLEDS /NCIC through the Oregon data switch. Includes a defined set of entry transactions (Message Keys) embedded within the RMS and JMS product. Standard keys include: Warrant Entry, Vehicle Entry, Protection Order entry (restraining, no-contact, stalking, temporary, emergency protective, extreme risk). Interface submits request and receives response from State.

The ORLEDS query keys will be defined for both RMS and JMS screens separately.

ORLEDS Inquiry Adapter (Standard Transaction Message Keys)

- a. **Inquiry**
 - i. **QWH(x)** - Query CCH (QWHD, QCRC, QNP)
 - ii. **W (QW)** - Query Person (QW)\ QW - Query Person (QW)
 - iii. **QHD** - Query OR CCH, NCIC/III, DMV & WANTS
 - iv. **DQ** - Driver's license query.
 - v. **DLR** - Driver's license query in State.
 - vi. **QLW (DLW)** – Query State Warrant.
 - vii. **DPL** - Driver's license query w/ Photo
 - viii. **QPO** – Query Protective Order
 - ix. **RR (QRR)** – Query Criminal History RR
- b. **Entry**
 - i. **EPO** – Protection Orders –
 - a. Req Supp Data entry – 4 (SMT, AKA, OLN, SOC)
 - ii. **EIP** – Person of Interest–
 - b. Req Supp Data entry – 4 (SMT, AKA, OLN, SOC)
 - iii. **EN** – Enter Supplemental
 - iv. **ENAD** – Enter Supplemental Address
 - v. **EW** – Enter Warrant
 - vi. **SW** – Enter In-State Warrant
- c. **Multi-Use (Free Form)**
 - i. **ORLEDS Pass-through Free form general Key – P1**
- d. **MODIFY**
 - i. **MPO** – Modify Protective Order

- ii. **MIP** – Modify Person of Interest
- iii. **MW** – Modify Warrant
- e. **LOCATE:**
 - i. **None Currently Included**
- f. **CLEAR**
 - ii. **CPO** – Clear Protection Orders
 - iii. **CW** – Clear Warrant
 - iv. **CIP** – Clear Person of Interest
 - v. **CN** – Cancel Supplemental
- g. **CANCEL**
 - i. **XPO** – Cancel Protection Orders
 - ii. **XW** – Cancel Warrant
 - iii. **XIP** – Cancel Person of Interest
 - iv. **XN** – Cancel Supplemental

Additional Task Responsibilities:

EIS will:

- a) Review and define supported message keys with CCSO.
- b) Configure M2 with ORLEDS/NCIC/NLETS forms to support the message formats required by ORLEDS, and to extract designated names data from;
 - a. JMS inmate, visitors & professional visitors screens to prepopulate ORLEDS masks.
 - b. RMS names Warrants and Protection orders.
- c) Configure the M2 switch with appropriate routing information.
- d) EIS will ensure EIS employees, and subcontractors comply with the agency security and access requirements as identified in the master contract.

CCSO will:

- a) Request additional keys if required for change order.
- b) Request the required mnemonics from the state.
- c) Agency will adhere to appropriate CJIS security at location that will utilize the ORLEDS features.
- d) Agency to provide dedicated ORLEDS connection will be provided for switch traffic.
- e) Manage responsibilities as enumerated in the general “Interface Task” section of the SOW.
- f) Ensure interface dependencies have been addressed.

Dependencies:

1. CCSO acceptance of EIS provided interface programming specification.
2. CCSO has provided appropriate mnemonics from the state.
3. CCSO adheres to appropriate CJIS security at location that will utilize the ORLEDS features.
4. Dedicated ORLEDS connection is provided for switch traffic.
5. Installation of the M2 data switch.
6. Installation and configuration of the M2 ORLEDS adapter.

Completion Criteria:

This task is complete when the system interface is capable of;

- a) Processing the query request through the M2 data switch and successfully transmitting to ORLEDS.

- b) Receiving the data returns from ORLEDS and routing to the requesting user's message queue and activating the message queue indicator within the JMS or RMS.
- c) Displaying the textual return to the user on request within the JMS or RMS environment.

Interface will be formally acknowledged as complete by CCSO in accordance with the system acceptance test.

Task INTR 16: Odyssey (Tyler Courts) Warrants Import Interface

Objective: Provide an interface to Import Warrant data provided by the Odyssey court system into the RMS Warrants module.

Task Description:

The Odyssey Interface is intended to load warrant data issued by the Courts into the RMS Warrants module. The interface will import the court provided warrant information and create a new warrant entry in the EIS Warrant module that will include the warrant cover/court information, warrant person information and support information capable of being mapped to existing EIS data fields. Typically, this data is queues for agency review prior to setting the record as active. As such the interface will set the imported record status as "Import" or other agency defined status indicator and post to the RMS workflow action list as defined in system workflow. Subject names received as part to the Tyler Warrant data payload will be added to the Warrant module and ported to the RMS MNI utilizing standard MNI post matching algorithm. The interface will be a one-way import of data from the Odyssey file into the RMS Warrant module, EIS will return no acknowledgement to the Odyssey as part of this transaction.

An EIS development specification detailing the interface will be provided to the CCSO for acceptance prior to the commencement of interface programming. It is the CCSO's responsibility to coordinate/contract with Odyssey (Tyler) to ensure that the court data is available and ready for use. All costs (if any) associated with the provision of the interface from Odyssey (Tyler) will be the sole responsibility of the CCSO.

Dependencies:

1. CCSO acceptance of EIS provided interface programming specification.
2. Current Interface specification reflecting expected data format and transaction control protocol from Odyssey.
3. Network Access to the required transaction/interchange point via the CCSO Network.

Completion Criteria:

This task is considered complete when the system interface is capable of extracting the warrant and person data from the received Odyssey data file, and successfully creates a new warrant data record within the RMS, and is viewable within the RMS Warrants module as designated in the development specification.

Interface will be formally acknowledged as complete by CCSO in accordance with the system acceptance test.

Note: EIS will write to an existing published interface provided from the CCSO / Odyssey (Tyler) for the purpose of this interface. EIS will not sub-contract development work on behalf of CCSO / Odyssey (Tyler).

Software Customization & Development Tasks (DEV)

This portion of the SOW specifically identifies custom development/configuration tasks included in the project. Custom development involves creating or modifying EIS's existing commercial code to change existing software behavior. The software development descriptions provided within this Statement of Work (SOW) are designed to illustrate the fundamental change and/or processing directives associated with the software development task at a sufficient level to determine the scope of work and associated pricing. A final software development specification will be provided for each software development deliverable referenced in this section following contract execution for CCSO approval. The software development specification will detail the precise customization or modification to be implemented, including UI concepts, underlying data calculations, processing protocols, etc. Once accepted and approved by CCSO, the software development specification becomes the definition of the software development deliverable and supersedes any representations provided in the SOW.

All software customizations will be developed and deployed in accordance with the EIS interface specifications accepted by the CCSO. Interface specifications will be prepared by the EIS development team and submitted to the CCSO project manager for acceptance. Once accepted, the development interface specification will be the final document and be incorporated into the contract forthwith. In the event a change to the specification is desired following acceptance of the initial development specification, an executed change order will be required. Depending on the nature of the modification requested, EIS reserves the right to require additional cost for software customization changes post specification acceptance.

EIS will develop the following agreed upon software customizations as part of this project:

Task DEV 1: JMS Development Services

Objective: Provide a summary of software deliverables to be customized/developed based on any request. Customizations itemized in this section are items that require software development work.

Task Description:

Provide enhancements to the core JMS application(s) and/or supporting components to better support CCSO specific procedures. The components referenced in this section may include in-scope development items (items that are standard licensed yet required development involvement) or out-of-scope items where the component represents an unanticipated change to the current release application software. The following items represent identified software enhancements and changes/development items.

Task development deliverables:

DEV.1a Day/Night Mode Pre-Book. Provide a user selectable day and night display color scheme option in Pre-Book application.

DEV.1b Program Scheduling. Provide internal function that posts program enrollment event(s) to the inmate's schedule as a batch function (where the programs schedule function generates a defined # of scheduled events to be posted to the inmate's schedule associated with the program assignment).

DEV.1c Inmate Mail processing recording/tracking capability. Create new Inmate Mail module. The Jail process incoming inmate mail and if a violation is identified will generate a set of notices to be mailed out to the parties. The jail staff will create a mail violation event, associate the inmate and the sender and record multiple violations (if needed). As such we are recommending the development of a **new** module that:

- a. Creates a basic record of the mail event (time, date, user processing, etc.)
- b. Links to a specific inmate
- c. Capture information from the sender (ideally pulls from the inmate's contacts or added as a new record. Must include the name and address information.
- d. Allows the designation of multiple violations from a user defined list.

- e. Supports media to receive a scanned copy of the offending material.
- f. Supports media to hold copies of the jail generated notice.
- g. Provides the generation of a SSRS form letter to be provided to both the inmate and the sending party.

DEV.1d JMS Printing UI. Configure/update the printing options in JMS to support email and redaction capabilities as is provided in RMS.

DEV.1e Sgt's Assessment review: The jail requires the initial intake assessment to be reviewed for every inmate inducted into the facility. As such the agency requires a simple method to record that the supervisor has reviewed the intake assessment within the system. The optimal method would be to have the supervisor review the completed PDF (not the question list in entry/edit mode), and record approval or rejection of the document. Final option to be determined post contract. Options include:

- a. Provide additional data elements on the assessment screen to capture review information.
- b. Create a task, and be able to launch and display the PDF from the task event.

DEV.1f Sgt's Arrest Affidavit review and approval: The jail requires the arresting officers arrest affidavit to be reviewed and approved for every inmate inducted into the facility. They are seeking a simple method to record that the supervisor has reviewed the assessment within the system. The optimal method would be to have the supervisor review arrest affidavit narrative in the JMS client on the pre-booking narrative tab, and provide data fields on the base of the screen to capture approval. This would require the following:

- a. Add a new data form section below the narrative display, above the button toolbar to add additional data fields.
- b. Add a new security object to the system to unlock the total data field set on this form as this capability should be limited to specifically assigned users.
- c. Add new data elements;
- d. Approved checkbox
- e. Time/date field
- f. Logged on user PIN & name.
- g. If the logged on user does not have permissions to access the fields, the fields should simply be disabled but remain visible.

DEV.1g TOC to location. Modification to the TOC module to allow the agency to optionally designate an outside location for the inmate as part of the TOC function.

DEV.1h Electronic Home detention Module Browser Based data collection. Add new database component and develop a new, browser based, EHD data form to collect EHD data tracked by the agency associated with inmates participating in the EHD program. The jail makes extensive use of EHD and needs to support and capture a variety of details related to the management of inmate supervision. All inmates are assessed for EHD participation, and they currently utilize a custom form to perform the initial review to determine eligibility. This includes a supervisory override to approve if the assessment indicates a negative result. At a minimum need the ability to record details and notes related to EHD checks (where deputies physically check in with EHD out-mates on a weekly basis). Please see Exhibit D – Development/Customizations Exhibits – 1 EHD form for illustration of existing CCSO data screen.

DEV.1i Naphcare automatic task clearance function. The modification would provide the capacity for the Naphcare import interface procedure to clear an existing JMS Task (assigned as part of the standard booking collection) within the associated inmates active booking record once the medical assessment has been completed in the external Naphcare system. We have proposed a bi-directional interface with NaphCare, however the JMS receiving function has not been defined and it is currently unknown as to what capability is available in the Naphcare transaction that would provide sufficient information to the JMS receiving processes to evaluate the completion of task in the Naphcare system.

DEV.1j PocketJMS Overdue Cell Checks color change. Modify PocketJMS cell check module to change background color when check interval becomes overdue.

DEV.1k PocketJMS Headcount: Provide headcount module in PocketJMS.

DEV.1l JMS Custom inmate booking summary RDL: Develop a custom inmate booking display report in SSRS for use by intake/processing team. RDL to display information in accordance with the data collection illustrated in Exhibit D - Inmate summary display.

DEV.1m Court Release Paper email: develop either user initiated or automated function to transmit copy of JMS generated release PDF to the selected courts via EIS Notification services on inmate release. This transmission be accomplished on either a per release basis (one document per release process) or as a batch process (a daily collection of release PDF's transmitted on a scheduled event basis for all releases performed within a configured period). Provide a 10 pack of notification templates to support the 10 courts identified by the County.

DEV.1n Audible tone in ASP Cell Check Dashboard: add a configurable audible tone to the ASP.MVC dashboard that is activated when the cell check duration timer expires.

DEV.1o Sentence Calculator enhancements: modifications to the EIS sentence calculator to include:

- i. Capture and calculate previous incarceration days by date range. EIS will add the capability to enter previous incarceration dates (start and end) and county/location of incarceration into the module and have the application calculate the # of days to be credited for each entry. The module should support the addition of multiple prior incarceration records and sum the total number of days to be credited from all of the entered prior incarceration records.
- ii. Capture good time days applied to the sentence based on a date range entry, where the system will calculate the number of days based on the date difference between the start and end date entered.
- iii. Capture weekend/holiday early release option and allow manual adjustment to the calculated sentence completion date.

We have included the county's existing sentence calculation form for illustration purposes in Exhibit D - sentence calculator.

DEV.1p Inmate Charge History Report: Develop a custom inmate charge history display report in SSRS for use by intake/processing team. RDL to display information in accordance with the data collection illustrated in Exhibit D - charge history.

Responsibilities:

EIS will:

- a) Prepare development specification for CCSO approval for each development deliverable.
- b) Provide software feature as described in the approved development specification.

CCSO will:

- a) Approve final development specification.

Completion Criteria:

As defined in the development specification for each item.

Task DEV 2: RMS Development Services

Objective: Provide a summary of software deliverables to be customized/developed based on any request. Customizations itemized in this section are items that require software development work.

Task Description:

Provide enhancements to the core RMS application(s) and/or supporting components to better support CCSO specific procedures. The components referenced in this section may include in-scope development items (items that are standard licensed yet required development involvement) or out-of-scope items where the component represents an unanticipated change to the current release application software. The following items represent identified software enhancements and changes/development items.

Task development deliverables:

DEV.2a Warrant Module AM Message Prefill. EIS will provide/develop a customized data function that will generate a formatted collection of text data compiled from the displayed warrant record that will populate a standard ORLEDS AM message form. The text data compilation will be represented as a single text string and posted to the message window. The intent of the function is to provide the details of the warrant to an external agency utilizing the ORLEDS AM messaging communication method.

DEV.2b Warrant Module Miscellaneous field add data template options. EIS will add the capability to populate the miscellaneous data field contained within the warrant's module with standardized text templates. A new template import function will be added to the warrants screen to provide a user interface accessing the assortment of text template options associated with the warrant's module. Text templates will be managed within RMS's existing text template capability accessed within the RMS Management tool.

Note: EIS will review the current posting of warrant data to the ORLEDS warrants mask to ensure that formatting characteristics entered into the Miscellaneous field remain when posting to the ORLEDS entry screen.

DEV.2c Warrant Module Name forced refresh. EIS will update module to ensure that the warrant name screen is automatically refreshed when entering a new name record and following a name import form MNI.

DEV.2d Warrant Module Daily Activity Report. EIS will develop a new SSRS report that will include a listing of all warrant records entered and modified within the past 24-hour period based on the warrant record change log. Output will be grouped by new entries and updates to existing entries. Additional report details to be defined between EIS and CCSO as part of project planning and definition phase.

DEV.2e Civil Process Provide a streamlined form data entry/management UI component. EIS will provide a new base civil entry UI form collection to facilitate data entry into the Civil Management module to include the additional of a set of data collection fields. We have included screen shots of the agency's existing ClassWeb civil application for comparison purposes in Exhibit D of this SOW document. These screen captures have been included to provide a descriptive exhibit highlighting the existing data fields and functions currently utilized by the agency as a reference for future software design activities. The resulting civil application development will be largely built on the current EIS civil software module, incorporating existing database, development functions and UI concepts existing in the standard EIS software product line. The inclusion of the Exhibit D material is in no way suggesting that EIS will emulate the existing CCSO civil software.

The application will be reformulated to support 5 primary base civil entry screens:

1. Civil Case – includes the basic initial civil process information including court information service details, etc.
 - a. Date/time received.
 - b. Plaintiff and respondent name (as provided by the court)
 - c. Service and court #'s
 - d. Calculated fees and payment receipt. To include a simple payment receipt creation and maintenance capability (see DEV.2g below).
 - e. Atty. Information

- f. General comment field.
2. Civil Names – Supports the variety of names entered into the civil system, including plaintiff’s, defendant, service persons, guardians, etc.
 - a. Person index identifier (they are often multiple persons involved e.g. eviction).
 - b. Person name information, First. Last middle, etc.
 - c. Name based service notes. Provides specific directives related to the service for that person.
 - d. Multiple address fields (2 minimum - primary and alternate) – it is common for persons being served to not live at their primary address (e.g. divorce) so the system needs to capture at minimum 2 addresses and allow the clerk to select which address appears as the serve to address on the civil worksheet.
 - e. Should pull addresses from previous involvement for person and display civil alerts associated with the person or address.
 - f. Entry of Multiple process(s) with support for free text options/entry.
 - g. Service commitment time, dates and service geo designation.
 - h. Witness fee (Tracked to indicate \$ amount paid to people presenting as witnesses).
 - i. General comments field.
 3. Civil Events – Track service activity including completion of service. Form to include:
 - a. Activity Type, deputy identity, Service time and date.
 - b. Information related to the person served (with ability to add a substitution of service directly in the screen). To Include person name, relationship, address where service was performed.
 - c. How served - service closeout reason.
 - d. Should allow for entry of alerts and cautions attached to the person/address.
 4. Civil Case Media – provides UI into the EIS Media Repository to support the attachment of images and electronic/digital documents.
 5. Civil search and recall screen – provide a general database search and retrieval function that will respond to user entered search criteria and return of listing of database records matching the entered search criteria. Search fields to include:
 - a. Plaintiff and defendant name
 - b. Service address
 - c. Property address
 - d. Court case #
 - e. Civil #
 - f. Civil entry date range

DEV.2f Civil Process Custom SSRS RDL Civil Worksheet. EIS will develop a single SSRS civil worksheet printout per agency specifications.

DEV.2g Civil Process Simple receipt and payment management. EIS will provide a function to generate printed receipt associated with any payment received and to edit/adjust issued payment receipts as needed. Receipt management tool should support general search functions, including date range, assigned receipt #, service #, etc. Additionally, the management tool should support the ability to update/modify receipt information within the tool.

DEV.2h Civil Process Address validation. Provide a mapping/address validation capability in Civil Management to assist with location identification as part of data entry.

DEV.2i Civil Activity report to Excel. EIS to provide a custom data export function within SSRS to export a non-formatted export of civil activity (based on any activity date recorded in the audit log) to an Excel spreadsheet file. Data to include:

- a. Service case #.
- b. Party
- c. Process type(s)
- d. Service Location details (City, County, State)
- e. Court
- f. Clerk adding/recording activity.
- g. Collation of dates, including; date civil service received, date entered, last date of attempted activity, date served (if completed), date posted (if posted), date closed (if closed).

DEV.2j Civil.WEB update service completion data collection. EIS will modify civil.web to support service attempt and completion fields in accordance with Dev.2e field enhancements.

Responsibilities:

EIS will:

- c) Prepare development specification for CCSO approval for each development deliverable.
- d) Provide software feature as described in the approved development specification.

CCSO will:

- b) Approve final development specification.

Completion Criteria:

As defined in the development specification for each item.

Data Conversion/Migration Tasks (DCON)

The CCSO currently utilizes a single jail application as part of daily jail operations and has identified the existing inmate data is to be targeted for conversion into the new JMS. Images/Mugshots are included in the primary jail data conversion set. Media items are not currently stored in the existing JMS system, and as such are not included in migrations services. The following datasets have been identified.

- a) **County Developed JMS** – CCSO’s core Jail management system and primary data source for booking, sentencing and release information – (To Be Migrated by EIS to the EIS JMS). Data housed in a standard SQL Server database.
- b) **Mugshot images for inmates in JMS available in standard JPG format.**
- c) **County Developed Warrants and Protection Orders** - Local System data migration.
- d) **County Developed Civil Process** - Local System data migration.

EIS will build several cycles into the JMS installation process to include sample data conversion testing and validation time prior to live operations (minimum of 3 cycles).

EIS will utilize an industry standard data migration methodology, documented in a data conversion plan as accepted by Clackamas County. The normal EIS implementation cycle provides two or more validation conversions. This gives the CCSO the opportunity to check the validation for completeness and accuracy before committing to take the system live. It also provides timing data that can be used to finalize the go-live procedures within the CCSO.

The Data Conversion Plan will contain specific details on data conversion. This enumerates the data to be converted, the conversion and validation steps, a go-live procedure, and any special field mappings that may be required by the CCSO. Special emphasis is placed on identifying and mitigating any data differences that exist between the new JMS and legacy JMS system.

Normally the first data conversion is done just before deploying the initial system installation for key project personnel. This provides data for training and also gives the CCSO the opportunity to validate the first pass data conversion. After the system is installed on site, key project personnel can work with EIS staff to certify the data conversion and correct any problems that have been identified. If necessary, additional test conversions can be done for certification. When the final data conversion test plan and sample data is acceptable to CCSO, the final go-live process can be scheduled, and the final data conversion will be done during this process.

EIS can only convert data into the new JMS system where usable data is provided by the CCSO and an appropriate related data element exists in the existing JMS database. Data that cannot be reconciled according to the conversion plan will not be converted. EIS makes no guarantee that all existing data can be converted.

Task DCON 1: EIS JMS Data Conversion/Migration

Objective: Convert the existing JMS data into the new system.

Task Description: Provide data conversion services to existing textual data and update the newly installed EIS JMS system with the historical information contained within the CCSO’s existing JMS system housed in the legacy database. Data to be converted includes the booking and inmate data currently housed in the CCSO’s JMS database, as well as the data collections to be identified within the JMS data conversion plan. EIS will load the data provided by the CCSO, programmatically modify the data to conform to the conversion standards defined by the CCSO in accordance with the conversion plan and upload the converted data to the operational database on the CCSO’s live JMS database server. It is understood that the CCSO is capable of extracting the active data into a standard SQL Server .BAK format when providing to EIS for conversion work.

Responsibilities

EIS will:

- a) Conduct the Data Discovery phase of the project by working with CCSO subject matter expert(s) to complete a data field mapping between the JMS and the existing JMS system.
- b) Develop a control document that describes agreed-upon mapping of data elements and the handling of exceptions.
- c) Develop the conversion code, including both the data extraction routines and the data upload scripts. Where possible perform the data conversion according to the specifications in the control document with data provided by the CCSO.
- d) A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert may be maintained in a notes field for historical reference.
- e) Verify current JMS database schemas on production servers.
- f) Deliver to CCSO and upload converted data to the CCSO designated production server.
- g) The Project Manager will assist in the data review with the CCSO and define Data Acceptance tests.
- h) Perform a final data conversion upon CCSO's review and approval of the test data conversion.

CCSO will:

- a) Provide existing data in common exchange format including ASCII, pipe-delimited files or in a common database structure (MS SQL Server, etc.) on request by EIS project manager. EIS prefers a standardized SQL .BAK file but can work with CCSO to determine an acceptable format. CCSO will be expected to perform **no less** than 3 full data extractions from the legacy system prior to system cutover.
- b) Provide subject matter expert(s) with sufficient expertise related to the data being converted. The subject matter expert(s) will work with EIS during the Data Review and Sign-Off phases.
- c) Provide conversion database(s) or access to the database to be converted in the EIS specified format.
- d) After completion, any changes to the data must be made by manual data entry by the CCSO or agree to a Change Order.
- e) Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS system.
- f) Clean up existing databases based on the standard naming conventions agreed to with EIS.
- g) Translate all existing picklists in the existing system to the standards agreed to with EIS.
- h) Review and approve results of test data conversion.
- i) Verify the integrity of the conversion and notify EIS of any conversion errors or anomalies.
- j) Verify specific data collections to assure accuracy of data, including:
 - a. Inmate Sentences and calculated release dates.
 - b. Inmate charge and charge status.
 - c. Inmate Bail
 - d. Inmate alerts
 - e. Inmate housing assignments.

Dependencies:

1. Provision of the JMS data in a common data interchange format (either a SQL .BAK or delimited file) format by CCSO.
2. CCSO JMS data specialist to assist with data mapping and validation.
3. CCSO provided screen shots and output report containing inmate data to assist with conversion mapping.
4. Network Access to the required transaction/interchange point via the CCSO Network.

Completion Criteria:

This task will be completed upon uploading into the new JMS databases the converted data records from the Department's existing JMS system, as outlined in the Data Conversion and External Conversion sections of the EIS developed project plan and verified by CCSO as defined in the Acceptance test plan.

Task DCON 2: EIS JMS Mugshot Image Conversion & Enrollment

Objective: Convert the existing JMS mugshot data into the new system and enroll the inmate's primary (1 per booking) image into the EIS Biometric Facial recognition engine.

Task Description: Provide data conversion services to existing textural data and update the newly installed EIS JMS system with the historical information contained within the CCSO's existing JMS system housed in the legacy database. Data to be converted includes the booking and inmate data currently housed in the CCSO's JMS database, as well as the data collections to be identified within the JMS data conversion plan. EIS will load the data provided by the CCSO, programmatically modify the data to conform to the conversion standards defined by the CCSO in accordance with the conversion plan and upload the converted data to the operational database on the CCSO's live JMS database server. It is understood that the CCSO is capable of extracting the active data into a standard SQL Server .BAK format when providing to EIS for conversion work.

Responsibilities

EIS will:

- i) Conduct the Data Discovery phase of the project by working with CCSO subject matter expert(s) to complete a data field mapping between the JMS and the existing JMS system.
- j) Develop a control document that describes agreed-upon mapping of data elements and the handling of exceptions.
- k) Develop the conversion code, including both the data extraction routines and the data upload scripts. Where possible perform the data conversion according to the specifications in the control document with data provided by the CCSO.
- l) A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert may be maintained in a notes field for historical reference.
- m) Verify current JMS database schemas on production servers.
- n) Deliver to CCSO and upload converted data to the CCSO designated production server.
- o) The Project Manager will assist in the data review with the CCSO and define Data Acceptance tests.
- p) Perform a final data conversion upon CCSO's review and approval of the test data conversion.

CCSO will:

- k) Provide existing data in common exchange format including ASCII, pipe-delimited files or in a common database structure (MS SQL Server, etc.) on request by EIS project manager. EIS prefers a standardized SQL .BAK file but can work with CCSO to determine an acceptable format. CCSO will be expected to perform **no less** than 3 full data extractions from the legacy system prior to system cutover.
- l) Provide subject matter expert(s) with sufficient expertise related to the data being converted. The subject matter expert(s) will work with EIS during the Data Review and Sign-Off phases.
- m) Provide conversion database(s) or access to the database to be converted in the EIS specified format.
- n) After completion, any changes to the data must be made by manual data entry by the CCSO or agree to a Change Order.
- o) Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS system.
- p) Clean up existing databases based on the standard naming conventions agreed to with EIS.
- q) Translate all existing picklists in the existing system to the standards agreed to with EIS.
- r) Review and approve results of test data conversion.
- s) Verify the integrity of the conversion and notify EIS of any conversion errors or anomalies.
- t) Verify specific data collections to assure accuracy of data, including:
 - a. Inmate Sentences and calculated release dates.
 - b. Inmate charge and charge status.
 - c. Inmate Bail
 - d. Inmate alerts
 - e. Inmate housing assignments.

Dependencies:

- 5. Provision of the JMS data in a common data interchange format (either a SQL .BAK or delimited file) format by CCSO.
- 6. CCSO JMS data specialist to assist with data mapping and validation.
- 7. CCSO provided screen shots and output report containing inmate data to assist with conversion mapping.
- 8. Network Access to the required transaction/interchange point via the CCSO Network.

Completion Criteria:

This task will be completed upon uploading into the new JMS databases the converted data records from the Department's existing JMS system, as outlined in the Data Conversion and External Conversion sections of the EIS developed project plan and verified by CCSO as defined in the Acceptance test plan.

Task DCON 3: EIS RMS (Warrants & PO) Data Conversion/Migration

Objective: Convert the existing ClassWeb Warrants and Protection Order data records into the new system.

Task Description: Provide data conversion services to existing textual data and update the newly installed EIS RMS system Warrants and Protection Order Modules with the historical information contained within the CCSO's existing ClassWeb Warrants and Protection Order system housed in the legacy database. Data to be converted includes the base warrant and warrant service information, protection orders, including protected persons and violations currently housed in the CCSO's ClassWeb database, as well as the data collections to be identified within the RMS data conversion plan if relevant. EIS will load the data provided by the CCSO, programmatically modify the data to conform to the conversion standards defined by the CCSO in accordance with the conversion plan and upload the converted data to the operational database on the CCSO's live EIS RMS database server. It is understood that the CCSO is capable of extracting the active data into a standard SQL Server .BAK format when providing to EIS for conversion work.

Responsibilities

EIS will:

- a) Conduct the Data Discovery phase of the project by working with CCSO subject matter expert(s) to complete a data field mapping between the EIS RMS and the existing ClassWeb system.
- a) Develop a control document that describes agreed-upon mapping of data elements and the handling of exceptions.
- b) Develop the conversion code, including both the data manipulation routines and the data upload scripts. Where possible perform the data conversion according to the specifications in the control document with data provided by the CCSO.
- c) A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert may be maintained in a notes field for historical reference.
- d) Verify current RMS database schemas on production servers.
- e) Deliver to CCSO and upload converted data to the CCSO designated production server.
- f) The Project Manager will assist in the data review with the CCSO and define Data Acceptance tests.
- g) Perform a final data conversion upon CCSO's review and approval of the test data conversion.

CCSO will:

- b) Provide existing data in common exchange format including ASCII, pipe-delimited files or in a common database structure (MS SQL Server, etc.) on request by EIS project manager. EIS prefers a standardized SQL .BAK file but can work with CCSO to determine an acceptable format. CCSO will be expected to perform **no less** than 3 full data extractions from the legacy system prior to system cutover.
- c) Provide subject matter expert(s) with sufficient expertise related to the data being converted. The subject matter expert(s) will work with EIS during the Data Review and Sign-Off phases.
- d) Provide conversion database(s) or access to the database to be converted in the EIS specified format.
- e) After completion, any changes to the data must be made by manual data entry by the CCSO or agree to a Change Order.
- f) Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS system.

- g) Clean up existing databases based on the standard naming conventions agreed to with EIS.
 - h) Translate all existing picklists in the existing system to the standards agreed to with EIS.
 - i) Review and approve results of test data conversion.
 - j) Verify the integrity of the conversion and notify EIS of any conversion errors or anomalies.
 - k) Verify specific data collections to assure accuracy of data, including:
 - a. Base warrant record with court information
 - b. Warrant service information
 - c. Base Protection orders with court information
 - d. Protected persons
 - e. Protection order violations
9. Provision of the RMS data in a common data interchange format (either a SQL .BAK or delimited file) format by CCSO.
 10. CCSO Warrant and Protection Order data specialist to assist with data mapping and validation.
 11. CCSO provided screen shots and output report containing inmate data to assist with conversion mapping.
 12. Network Access to the required transaction/interchange point via the CCSO Network.

Completion Criteria:

This task will be completed upon uploading into the new EIS RMS databases the converted data records from the agency’s existing ClassWeb warrants and protection order system, as outlined in the Data Conversion and External Conversion sections of the EIS developed project plan and verified by CCSO as defined in the Acceptance test plan.

Task DCON 4: EIS CIVIL Data Conversion/Migration

Objective: Convert the existing Civil data into the new system.

Task Description: Provide data conversion services to existing textual data and update the newly installed EIS Civil system with the historical information contained within the CCSO’s existing ClassWeb Civil system housed in the legacy database. Data to be converted includes the Civil Service records and Civil Real Property data records currently housed in the CCSO’s Civil database. EIS will load the data provided by the CCSO, programmatically modify the data to conform to the conversion standards defined by the CCSO in accordance with the conversion plan and upload the converted data to the operational database on the CCSO’s live RMS database server. It is understood that the CCSO is capable of extracting the active data into a standard SQL Server .BAK format when providing to EIS for conversion work.

Responsibilities

EIS will:

- a) Conduct the Data Discovery phase of the project by working with CCSO subject matter expert(s) to complete a data field mapping between the EIS RMS Civil system and the existing ClassWeb Civil system.
- b) Develop a control document that describes agreed-upon mapping of data elements and the handling of exceptions.

- c) Develop the conversion code, including both the data manipulation routines and the data upload scripts. Where possible perform the data conversion according to the specifications in the control document with data provided by the CCSO.
- d) A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert may be maintained in a notes field for historical reference.
- e) Verify current RMS Civil database schemas on production servers.
- f) Deliver to CCSO and upload converted data to the CCSO designated production server.
- g) The Project Manager will assist in the data review with the CCSO and define Data Acceptance tests.
- h) Perform a final data conversion upon CCSO's review and approval of the test data conversion.

CCSO will:

- a) Provide existing data in common exchange format including ASCII, pipe-delimited files or in a common database structure (MS SQL Server, etc.) on request by EIS project manager. EIS prefers a standardized SQL .BAK file but can work with CCSO to determine an acceptable format. CCSO will be expected to perform **no less** than 3 full data extractions from the legacy system prior to system cutover.
- b) Provide subject matter expert(s) with sufficient expertise related to the data being converted. The subject matter expert(s) will work with EIS during the Data Review and Sign-Off phases.
- c) Provide conversion database(s) or access to the database to be converted in the EIS specified format.
- d) After completion, any changes to the data must be made by manual data entry by the CCSO or agree to a Change Order.
- e) Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS system.
- f) Clean up existing databases based on the standard naming conventions agreed to with EIS.
- g) Translate all existing picklists in the existing system to the standards agreed to with EIS.
- h) Review and approve results of test data conversion.
- i) Verify the integrity of the conversion and notify EIS of any conversion errors or anomalies.
- j) Verify specific data collections to assure accuracy of data, including:
 - a. Base Civil process records with court information
 - b. Civil Names/persons
 - c. Service attempts and completion of service records

Dependencies:

1. Provision of the Civil data in a common data interchange format (either a SQL .BAK or delimited file) format by CCSO.
2. CCSO Civil data specialist to assist with data mapping and validation.
3. CCSO provided screen shots and output report containing inmate data to assist with conversion mapping.
4. Network Access to the required transaction/interchange point via the CCSO Network.

Completion Criteria:

This task will be completed upon uploading into the new EIS RMS Civil databases the converted data records from the agency's existing ClassWeb Civil system, as outlined in the Data Conversion and External Conversion sections of the EIS developed project plan and verified by CCSO as defined in the Acceptance test plan.

User Training and Live Operations

Note: EIS personnel will operate on-site at the CCSO to conduct user training and take the proposed system live.

User Training Services (TRN)

Task TRN 1: JMS Administrator Training

Objective: Provide on-site training services in accordance with purchased training services for system administration personnel. Conduct JMS technical and administrative training and supply related system administrative materials as described in the Training Plan. Provide JMS and supporting systems - System Administrator Training.

Note: The core administrator training will be performed during the JMS configuration workshop and supplemented throughout the configuration phase.

Task Description:

EIS will provide training services and assist CCSO administrative staff in the configuration and maintenance of the JMS, application configurations and entry of CCSO-specific information such as code tables, users, system access, etc. along with functional use on the operation and support of the installed JMS system and supporting subsystems.

Jail Administration: This course covers use of several supervisory programs; including MNI maintenance, Inmate PIN management, Housing Location Maintenance, Security Maintenance, and Table Maintenance along with specialized reporting function including SSA, SCAAP.

Topics covered include: Maintaining the master inmate identifier, maintaining code tables, maintaining security and program, Configuring and authorizing personnel to use the State Switch permissions.

2 – 8 Hour training classes

1 – SQL Server Reporting Services (SSRS) Training Class

Responsibilities:

EIS will:

- a) Provide standard training sessions for CCSO administrative personnel on the configuration of JMS databases and entry of CCSO-specific data.

CCSO will:

- a) Determine a primary and minimum of one (1) backup system administrator to receive administrative training.
- b) Develop and enter all CCSO-specific input data that is to be entered manually.
- c) Be responsible for the accuracy and completeness of the data provided and entered.
- d) Ensure the participation of the appropriate personnel in the training session, and general user training.

Completion Criteria:

This task will be completed once on-site training classes for both CCSO staff and selected end-users have been conducted, as specified on the training plan detailing the training classes and the training class durations, and when EIS training staff has trained the CCSO administrator on procedures for configuring the JMS databases and entering specific data.

Task TRN 2: JMS Technical and User Training

Objective: Provide on-site training services in accordance with purchased training services as specified in the implementation schedule to an estimated 160 JMS system users over **8 classes**.

Task Description:

EIS will conduct standard and specialized training courses as detailed in the implementation plan to provide training services and materials to designated CCSO personnel on the use of the JMS system, subsystems or other designated components, as described. Training services have been structured to accommodate between 18 and 20 users per class at an CCSO provided training facility.

Jail User: This is a “hands-on” training course for personnel that will be required to access information and enter data into the PS.NET JMS system. The course covers all the key modules included in the Jail Management Program, but most time is spent on the core booking, housing and release elements of the module. This class provides a working overview, and agency specific guidelines for the appropriate use of the JMS.

Topics covered include logging on and starting the program, Program navigation, Use of Code Tables and help facilities, Inmate searching and record reconciliation, booking activities including inmate identification, arrest information, charge management, housing, movement and classifications. Specific emphasis on data access and forms. Description of data fields and forms, Saving data and Best Operating Practices.

8 – 8 hour classes.

Responsibilities:

EIS will:

- a) Provide standard training sessions for CCSO technical and end user personnel on the operations of the JMS system as specified in the implementation plan.
- b) Training is structured to the requirements of the CCSO. EIS is flexible on course hours, times, days, etc. Courses may be given multiple times to accommodate shift and other scheduling requirements. Scheduling will be developed by CCSO and EIS.
- c) Provides training manuals and any other materials required for the training in electronic format.
- d) Provide knowledgeable training staff to conduct classes.

CCSO will:

- a) Designation of a training coordinator that will work with the EIS project manager to schedule training at the CCSO. The training coordinator will be responsible for ensuring that CCSO personnel are available, and relieved of routine duties, during scheduled training sessions.
- b) Make arrangements and assignments for all required personnel to attend EIS training with their appropriate functional group. Ensure the participation of the appropriate personnel in the training session, and general user training.
- c) Provide data entry policies and procedures for each functional group.

- d) Follow up with any training attendees who may need extra help and assistance in order to grasp the necessary concepts.
- e) Ensure system administrative personnel attend and are available during each scheduled training session to answer policy questions.
- f) Provide a dedicated training area that can comfortably accommodate the scheduled classes. This classroom must accommodate individual workstations for each student. Training is generally done on the customer's site using the actual operational system. The training area must also accommodate an overhead projector, projector screen/whiteboard, and include workspace in the back of the room for EIS Personnel.

Completion Criteria:

This task will be completed once on-site training classes for both CCSO staff and selected end-users have been conducted as specified on the implementation plan.

Task TRN 3: RMS Technical and User Training

Objective: Provide on-site training services in accordance with purchased training services as specified in the implementation schedule to an estimated 24 RMS system users over **2 classes (Includes Warrants, Protection Orders and Civil Process)**.

Task Description:

EIS will conduct standard and specialized training courses as detailed in the implementation plan to provide training services and materials to designated CCSO personnel on the use of the RMS application modules, subsystems or other designated components, as described. Training services have been structured to accommodate between 18 and 20 users per class at an CCSO provided training facility.

RMS User: This is a "hands-on" training course for personnel that will be required to access information and enter data into the PS.NET RMS system. The course covers all the key modules included in the Records Management Program and Civil Process Software applications, including basic RMS administrative functions and ORLEDS integration. This class provides a working overview, and agency specific guidelines for the appropriate use of the JMS.

Topics covered include logging on and starting the program, Program navigation, Use of Code Tables and help facilities, searching and record reconciliation, data entry activities and daily use scenarios. Specific emphasis on data access and forms. Description of data fields and forms, Saving data and Best Operating Practices.

2 – 8 hour classes.

Responsibilities:

EIS will:

- a) Provide standard training sessions for CCSO technical and end user personnel on the operations of the delivered RMS system as specified in the implementation plan.
- b) Training is structured to the requirements of the CCSO. EIS is flexible on course hours, times, days, etc. Courses may be given multiple times to accommodate shift and other scheduling requirements. Scheduling will be developed by CCSO and EIS.
- c) Provides training manuals and any other materials required for the training in electronic format.
- d) Provide knowledgeable training staff to conduct classes.

CCSO will:

- a) Designation of a training coordinator that will work with the EIS project manager to schedule training at the CCSO. The training coordinator will be responsible for ensuring that CCSO personnel are available, and relieved of routine duties, during scheduled training sessions.
- b) Make arrangements and assignments for all required personnel to attend EIS training with their appropriate functional group. Ensure the participation of the appropriate personnel in the training session, and general user training.
- c) Provide data entry policies and procedures for each functional group.
- d) Follow up with any training attendees who may need extra help and assistance in order to grasp the necessary concepts.
- e) Ensure system administrative personnel attend and are available during each scheduled training session to answer policy questions.
- f) Provide a dedicated training area that can comfortably accommodate the scheduled classes. This classroom must accommodate individual workstations for each student. Training is generally done on the customer's site using the actual operational system. The training area must also accommodate an overhead projector, projector screen/whiteboard, and include workspace in the back of the room for EIS Personnel.

Completion Criteria:

This task will be completed once on-site training classes for both CCSO staff and selected end-users have been conducted as specified on the implementation plan.

Go-Live Services (GL)

Task GL 1: Jail Production Cutover

Objective: Complete final data conversion and cut over to live operation of the JMS system and maintain on-site support for designated Go-Live Support Service duration.

Task Description:

Upon completion of the user training, EIS will conduct a final data conversion and take the JMS system live. EIS personnel will remain on site following JMS cutover for a period of up to 5 Days Following Go-Live to assist users with the new system and respond to any issues discovered with the live system. Final data conversion and cutover generally takes 24-72 hours. A data conversion and cutover plan will be included in the Project Plan. Support services period for the system will commence on the go-live date.

Responsibilities:

EIS will:

- a. Complete a final data conversion.
- b. Assist the CCSO to verify the final converted data.
- c. Assist the CCSO staff in placing JMS into a production status.
- d. Initiate system interfaces as required.
- e. Provide ON-SITE start-up support resources and go-live assistance by EIS technical staff for up to five (5) calendar days post cutover to monitor the subsystem and to respond to issues identified.
- f. Monitor the initial operation of JMS and answer any operational questions raised by the CCSO.
- g. Provide start-up support and any required go-live assistance.

CCSO will:

- a. Place the software into production and begin operational use in consultation with EIS and in accordance with the Project Schedule.
- b. Ensure appropriate CCSO staff are available as required to support transition.
- c. Coordinate with third party vendors as required for interface transition.

Completion Criteria:

This task will be completed once the final data conversion is completed and verified, and the JMS system taken live.

Dependencies:

1. Receipt of formal acceptance from CCSO Project Manager with authorization to proceed to system "Go-Live".
2. Completion of end-user training.

Completion Criteria:

This task is considered complete when JMS is placed into production operation.

Task GL 2: RMS Production Cutover

Objective: Complete final data conversion and cut over to live operation of the RMS system and maintain on-site support for designated Go-Live Support Service duration.

Task Description:

Upon completion of the user training, EIS will conduct a final data conversion and take the RMS system live. EIS personnel will remain on site following RMS cutover for a period of up to 3 Days Following Go-Live to assist users with the new system and respond to any issues discovered with the live system. Final data conversion and cutover generally takes 24-72 hours. A data conversion and cutover plan will be included in the Project Plan. Support services period for the system will commence on the go-live date.

Responsibilities:

EIS will:

- a. Complete a final data conversion.
- b. Assist the CCSO to verify the final converted data.
- c. Assist the CCSO staff in placing RMS into a production status.
- d. Initiate system interfaces as required.
- e. Provide ON-SITE start-up support resources and go-live assistance by EIS technical staff for up to three (3) calendar days post cutover to monitor the subsystem and to respond to issues identified.
- f. Monitor the initial operation of RMS Software applications and answer any operational questions raised by the CCSO.
- g. Provide start-up support and any required go-live assistance.

CCSO will:

- a. Place the software into production and begin operational use in consultation with EIS and in accordance with the Project Schedule.
- b. Ensure appropriate CCSO staff are available as required to support transition.
- c. Coordinate with third party vendors as required for interface transition.

Completion Criteria:

This task will be completed once the final data conversion is completed and verified, and the RMS system taken live.

Dependencies:

1. Receipt of formal acceptance from CCSO Project Manager with authorization to proceed to system "Go-Live".
2. Completion of end-user training.

Completion Criteria:

This task is considered complete when delivered RMS application modules are placed into production operation.

System Acceptance/Final Acceptance (COM)

Task COM 1: JMS Final Acceptance

Objective: Complete post go-live final system acceptance with the following tasks associated with the final acceptance milestones.

Task Description:

Perform a series of acceptance tasks based on the following time periods.

1. Within 3 days of system “Go-Live”, EIS will certify completion of the JMS system installation in writing to CCSO.
2. Upon receipt of the installation certification, EIS and CCSO project managers will ensure that work per this Statement of Work, and any project change orders, has been completed and will acknowledge go-live acceptance of the system in accordance with the Acceptance Plan. Note: Specific deliverables may be deferred per mutual agreement between EIS and CCSO and may be removed from final acceptance via system change order.
3. Final acceptance will be considered completed within 30 days of the system Go-Live (unless specified otherwise under the terms of the purchase agreement).

Completion Criteria:

This task is considered complete when the system acceptance criterion, as described in the Acceptance Plan, has been met and final system acceptance has been acknowledged in writing by CCSO.

Task COM 2: RMS (Warrants & PO) Final Acceptance

Objective: Complete post go-live final system acceptance with the following tasks associated with the final acceptance milestones.

Task Description:

Perform a series of acceptance tasks based on the following time periods.

1. Within 3 days of system “Go-Live”, EIS will certify completion of the Warrants and Protection Order RMS modules system installation in writing to CCSO.
2. Upon receipt of the installation certification, EIS and CCSO project managers will ensure that work per this Statement of Work, and any project change orders, has been completed and will acknowledge go-live acceptance of the system in accordance with the Acceptance Plan. Note: Specific deliverables may be deferred per mutual agreement between EIS and CCSO and may be removed from final acceptance via system change order.
3. Final acceptance will be considered completed within 30 days of the system Go-Live (unless specified otherwise under the terms of the purchase agreement).

Completion Criteria:

This task is considered complete when the system acceptance criterion, as described in the Acceptance Plan, has been met and final system acceptance has been acknowledged in writing by CCSO.

Task COM 3: Civil Process Final Acceptance

Objective: Complete post go-live final system acceptance with the following tasks associated with the final acceptance milestones.

Task Description:

Perform a series of acceptance tasks based on the following time periods.

1. Within 3 days of system “Go-Live”, EIS will certify completion of the Civil Process modules system installation in writing to CCSO.
2. Upon receipt of the installation certification, EIS and CCSO project managers will ensure that work per this Statement of Work, and any project change orders, has been completed and will acknowledge go-live acceptance of the system in accordance with the Acceptance Plan. Note: Specific deliverables may be deferred per mutual agreement between EIS and CCSO and may be removed from final acceptance via system change order.
3. Final acceptance will be considered completed within 30 days of the system Go-Live (unless specified otherwise under the terms of the purchase agreement).

Completion Criteria:

This task is considered complete when the system acceptance criterion, as described in the Acceptance Plan, has been met and final system acceptance has been acknowledged in writing by CCSO.

IN WITNESS WHEREOF, the parties hereto, having read this SOW in its entirety, do agree thereto in each and every particular.

Approved

EIS

By: Justin Davis
Digitally signed by Justin Davis
Date: 2024.04.05 12:27:22 -04'00'

Signature

Justin Davis

Print or Type Name

EIS Project Manager

Title

Date

Approved

Clackamas County

By: _____

Signature

Print or Type Name

Chair

Title

Date

Exhibit A - Change Order Form (standard)

Change Order Agreement

SECTION A. CHANGE ORDER DESCRIPTION

| | | | |
|---------------|----------------------|-------------|--|
| CR #: | | Date: | |
| Client Name: | Clackamas County, OR | Requestor: | |
| Project Name: | Clackamas County JMS | Priority: | |
| Impact Area: | | Target Date | |

This document incorporates by reference the existing contract _____ dated _____.

Short Description of Change:

Modify existing agreement to include

a.

Detail Description of Change:

1. Modify existing agreement to include.....

a.

Clackamas County Sheriff's Office Financial/Cost Impact

SECTION B: IMPACT STATEMENT

| |
|-----------------------------|
| Conditional Payment: |
| |
| Schedule Impact: |
| |

THE PARTIES ACKNOWLEDGE THAT THEY HAVE READ THIS CHANGE ORDER, UNDERSTAND IT, AND AGREE TO BE BOUND BY ITS TERMS AND CONDITIONS. FURTHER, THE PARTIES AGREE THAT THE COMPLETE AND EXCLUSIVE STATEMENT OF THE AGREEMENT BETWEEN THE PARTIES RELATING TO THE SERVICES DESCRIBED HEREIN CONSISTS OF THIS CHANGE ORDER. THIS STATEMENT OF THE CHANGE ORDER SUPERSEDES ALL PROPOSALS OR OTHER PRIOR ACKNOWLEDGEMENTS, ORAL OR WRITTEN, AND ALL OTHER COMMUNICATIONS BETWEEN THE PARTIES RELATING TO THIS SUBJECT.

Change Order Agreed to:
EIS

Change Order Agreed to:
County

By: _____
Authorized Signature

By: _____
Authorized Signature

Name:
Title:
Date:

Name:
Title:
Date:

Exhibit B - Minimum Hardware Standards



Exhibit C - RACI Template

Clackamas County Responsibility Matrix

Project Name: Clackamas County Software

Project Manager:

Stakeholders

| JMS Activities | Name EIS Project Mgr | Name County Project Mgr | Name Sponsor | Name Tech Lead | Name Finance | Name IT Analyst | Name Business Lead | Name Testing |
|-------------------------------------|-------------------------------|----------------------------------|-----------------|----------------------|-----------------|-----------------------|--------------------------|-----------------|
| Initiation (Concept Phase) | | | | | | | | |
| Project Request | P S | | S | - | S | - | - | - |
| Define Objectives, Deliverables | A | | A | I | | - | I | - |
| Project Organization | A | | I | I | | - | I | I |
| Cost Estimate | P | | P | I | A | I | P | I |
| Risk Assessment | P | | I | P | | P | P | P |
| Justification statement | I | | P | I | | I | I | - |
| Develop Project Charter | A | | S | S | S | I | S | I |
| Elaboration (Planning Phase) | | | | | | | | |
| RFP Development | | | | | | | | |
| Vendor Selection | | | | | | | | |
| Scope Statement | | | | | | | | |
| WBS | | | | | | | | |
| Project Schedule | | | | | | | | |
| Communications Plan | | | | | | | | |
| Project Budget | | | | | | | | |
| Quality Plan | | | | | | | | |
| Use Case Analysis | | | | | | | | |
| Specifications | | | | | | | | |



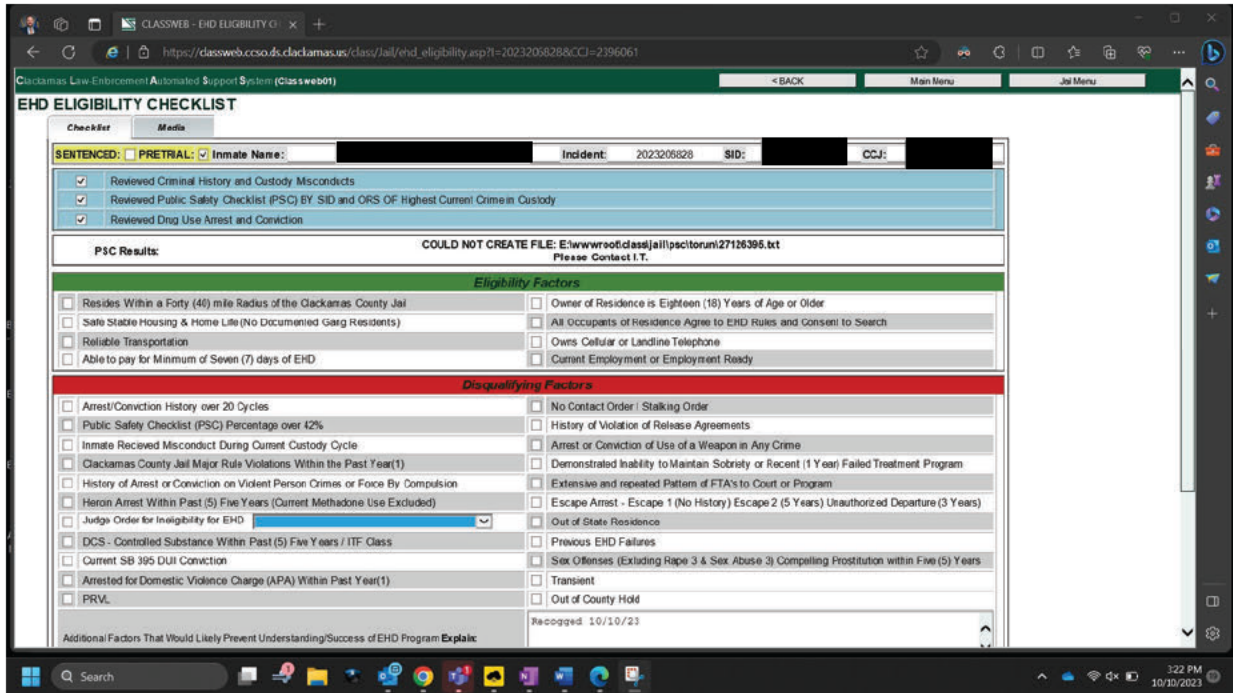
| | | | | | | | | |
|---|--|--|--|--|--|--|--|--|
| Architecture | | | | | | | | |
| Design | | | | | | | | |
| Prototypes | | | | | | | | |
| Test Plan | | | | | | | | |
| Construction (Execution Phase) | | | | | | | | |
| Product Development | | | | | | | | |
| Quality Control (e.g. testing) | | | | | | | | |
| Quality Assurance | | | | | | | | |
| Documentation | | | | | | | | |
| Training development | | | | | | | | |
| Configuration Management | | | | | | | | |
| Transition (Testing / Rollout Phase) | | | | | | | | |
| System testing | | | | | | | | |
| Rollout | | | | | | | | |
| User training | | | | | | | | |
| Project Close | | | | | | | | |
| Lessons Learned | | | | | | | | |

Code

| | | |
|---|-------------------|--|
| A | Accountable | Responsible for success/failure of this activity |
| P | Participant | Actively participates in the activity |
| R | Review Required | This person must review the output of this activity |
| I | Input Required | Project Team needs input from this person in this activity |
| S | Sign-off Required | Must sign-off the appropriate document |

Exhibit D – Development/Customizations Exhibits

EHD (Electronic Home Detention). Data screen from existing CCSO Class Web application detailing the current EHD data collection screen.





Inmate summary display

Clackamas Law-Enforcement Automated Support System (Classweb01) < BACK Main Menu Warrants Menu

Adult in Custody Summary JA IA CA VA PC PA SI R T IP CC Inmate Options

Book #: **23-500524** Search

| Personal Information | | | | Status | | | |
|--|--|--|--|---|--|--|--|
| IN CUSTODY (M4-A) | | | | Alerts/Social Conditions | | | |
| Name: [REDACTED] | | | | ALERT: RESTRAINT APPROVED 02/25/19 1500 | | | |
| Address (0 Additional): [REDACTED] | | | | ALERT: EHD - APPLICATION DENIED(20231006) | | | |
| City/State/Zip: [REDACTED] | | | | SPECIAL DISCIPLINARY HISTORY(20231031) | | | |
| Phone: [REDACTED] | | | | SEP: [REDACTED] | | | |
| SSN: [REDACTED] | | | | SEP: [REDACTED] | | | |
| Date of Birth: [REDACTED] | | | | SEP: [REDACTED] | | | |
| Race/Sex/Ht/Wt: [REDACTED] | | | | SEP: [REDACTED] | | | |
| Emergency: [REDACTED] | | | | LOP: 6 Days Ending 11/4/2023 | | | |
| Booking/Classification | | | | Known AKAs | | | |
| Incident #: 23-066971 | | | | DOB | | | |
| Booked: 10/06/23 0305 | | | | 27 Days in Custody Verify | | | |
| Custody Level: MEDIUM | | | | MISCONDUCT: 1 (This Booking) | | | |
| F/R Score: 3800 | | | | BEHAVIOR: 0 (This Booking) | | | |
| Last / Next: / | | | | GRIEVANCES: 0 (This Booking) | | | |
| Arrested: 10/06/23 2330 | | | | VISITING HOURS: NO VISITING ALLOWED | | | |
| Arrest Loc.: Safeway, 4320 Se King Rd, Milwaukie | | | | WORK STATUS: MEDICAL DENIED | | | |
| Arrested By: HERMANN ISAAC - DPSST# 61699 (MIPD) | | | | | | | |
| Bin/Searched: 552 / JIMENEZ CHRIS | | | | Language: ENGLISH | | | |

Charges View Charge History

| No | Charge | Date | Time | Cust Type | Status | Bail Status | Bail | Court | Jurisdiction | Insts |
|-------|---------------------------------|----------|------|-------------------|-------------|-------------|------|-------|--------------|-------|
| TS | 1 THEFT II -1 | 10/06/23 | 0305 | PC | DISMISSED | NO BAIL | 0 | C | CLACKAMAS | SRH |
| TC/TS | 2 PBV POSSN OF A STOLEN VEHICLE | 10/06/23 | 0306 | WRT # 20CR06467-C | SENTENCED | NO BAIL | 0 | C | CLACKAMAS | SRH |
| TC/TS | 3 PBV PCS-HEROIN -2 | 10/06/23 | 0307 | WRT # 19CR62455-D | SENTENCED | NO BAIL | 0 | C | CLACKAMAS | SRH |
| TC/TS | 4 THEFT II | 10/06/23 | 1035 | DA # 23CR48902 | TIME SERVED | NO BAIL | 0 | C | CLACKAMAS | KPH |

| Good Time | | | | Work Time | | | |
|---------------------------|----------|----------------------|--------------------|---------------------------|-------------------------|------------|--|
| Date Received | Sentence | Maximum Release Date | Credit Time Served | Maximum Good Time Release | Max Good Time Work Date | Release | |
| 10/06/2023 | 30 | 11/04/2023 | 00/00/0000 | 11/01/2023 | 00:00:0000 | 11/01/2023 | |
| Time Computation Comments | | | | | | | |

Total Bail: 0

Release Information

No Records Found Matching Requested Search Criteria

Sort: ^ v Color Mode: GCSD USER Change Sign Off?



Sentence calculator

| Sentence Calculation | | Julian Date | Calendar Date |
|---|--|-------------|------------------|
| Date Sentence Starts: | 09/24/2021 | Time : | 1820 |
| TOTAL SENTENCE: | 180 days / 0 hours - 0 time served hours | | |
| | <input type="checkbox"/> Consecutive / <input type="checkbox"/> Concurrent to: | | |
| MAXIMUM RELEASE DATE | Tuesday | 81 | 3/22/2022 |
| Release Modifiers | | | |
| Inoperative Time (ORS 137.370(2)) : | <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO | | |
| Credit For Time Served : | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | | |
| + County: | Start: End: = Days | | |
| - County: clac | Start: 07/12/2021 End: 07/15/2021 = 4 Days | | |
| - County: clac | Start: 03/02/2021 End: 03/15/2021 = 14 Days | | |
| - County: clac | Start: 12/09/2020 End: 12/10/2020 = 2 Days | | |
| ADJUSTED CTS RELEASE DATE: | Wednesday | 61 | 3/2/2022 |
| Good Days Possible (ORS 169.110) : | <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO | | |
| Start: 09/24/2021 End: 3/22/2022 = 24 Days | | | |
| ADJUSTED GOOD TIME RELEASE DATE: | Sunday | 37 | 2/06/2022 |
| Work Time Possible (ORS 169.120) : | <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO | | |
| FINAL RELEASE DATE | Sunday | 37 | 2/06/2022 |
| Weekend/Holiday Release Date(ORS 137.375) : | <input checked="" type="checkbox"/> YES - <input type="checkbox"/> NO | | |
| Enter Release Date: | 02/04/2022 | | |
| ADJUSTED FINAL RELEASE DATE | Friday | 35 | 2/4/2022 |



Charge history

| Inmate Charge History | | | | | | | | | | | | |
|-----------------------|---------------------------------|-------------|------------------|-------|-------|-------------------------------|---------------|-------------|---------|------|-----------|------|
| Booked | Charge | ORS | Date/Time | Juris | Count | Cost Type | Charge Status | Bail | Status | Name | Case Type | Cost |
| Booked: 10/16/2013 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | THEFT II | 164.045-1-1 | 10/16/2013 03:05 | CLACK | 1 | PC | DISMISSED | Not Allowed | NO BAIL | | | |
| 2 | PCV POSSESS OF A STOLEN VEHICLE | 164.045-2-2 | 10/16/2013 03:05 | CLACK | 1 | WATKINS WRT # 20CR08467-C | SENTENCED | Not Allowed | NO BAIL | | | |
| 3 | PCV PCS-HEROIN | 164.045-2-2 | 10/16/2013 03:05 | CLACK | 1 | WATKINS WRT # 19CR20455-D | SENTENCED | Not Allowed | NO BAIL | | | |
| 4 | THEFT II | 164.045 | 10/16/2013 03:05 | CLACK | 1 | WATKINS WRT # 20CR08467-B | TIME SERVED | Not Allowed | NO BAIL | | | |
| Booked: 02/10/2013 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | PCV PCS-HEROIN | 475.054-2-2 | 02/16/2013 03:05 | CLACK | 1 | WETZEL WRT # 19CR20455-C | TIME SERVED | Not Allowed | NO BAIL | | | |
| 2 | PCV POSSESS OF A STOLEN VEHICLE | 164.045 | 02/16/2013 03:05 | CLACK | 1 | WETZEL WRT # 20CR08467-B | TIME SERVED | Not Allowed | NO BAIL | | | |
| Booked: 02/05/2012 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | PCV PCS-HEROIN | 475.054-2-2 | 02/15/2012 19:04 | CLACK | 1 | WRT # 19CR20455-D | RECOGNIZED | Not Allowed | NO BAIL | | | |
| 2 | PCV POSSESS OF A STOLEN VEHICLE | 164.045-1-1 | 02/15/2012 19:04 | CLACK | 1 | WRT # 20CR08467-A | RECOGNIZED | Not Allowed | NO BAIL | | | |
| 3 | PAROLE VIOLATION SB150 | 144.368 | 02/15/2012 19:04 | PAROL | 1 | WRT # 17D12593 | RELEASED | Not Allowed | NO BAIL | | | |
| 4 | FTA THEFT II | 164.045 | 02/15/2012 19:04 | BEAVE | 1 | WRT # 21-11597 | RECOGNIZED | \$6000 | TO POST | | | |
| Booked: 09/07/2011 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | PAROLE VIOLATION SB150 | 144.368 | 09/07/2011 11:33 | PAROL | 1 | PO RICE WRT # 17D12593 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 2 | PCV POSSESS OF A STOLEN VEHICLE | 164.045-1-1 | 09/07/2011 11:33 | CLACK | 1 | WRT # 20CR08467 | RECOGNIZED | Not Allowed | NO BAIL | | | |
| 3 | PCV PCS-HEROIN | 475.054-2-2 | 09/07/2011 11:33 | CLACK | 1 | WRT # 19CR20455-A | RECOGNIZED | Not Allowed | NO BAIL | | | |
| Booked: 02/07/2010 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | PCV THEFT III | 164.043 | 02/07/2010 00:06 | MCLAL | 1 | WRT # 19-3100-A | RECOGNIZED | \$25000 | TO POST | | | |
| 2 | PCV THEFT II | 164.045-1-1 | 02/07/2010 00:06 | MCLAL | 1 | WRT # 18-32142-B | RECOGNIZED | \$25000 | TO POST | | | |
| 3 | PCV THEFT III | 164.043 | 02/07/2010 00:06 | MCLAL | 1 | WRT # 18-32142-25 | RECOGNIZED | \$0 | TO POST | | | |
| 4 | PCV CRIM TRESPASS II | 164.245 | 02/07/2010 00:06 | MCLAL | 1 | WRT # 18-32142-B | RECOGNIZED | \$0 | TO POST | | | |
| 5 | PCS-HEROIN | 475.054-2-2 | 02/07/2010 00:06 | CLACK | 1 | WRT # 19CR20455 | RELEASED | \$20000 | TO POST | | | |
| 6 | PCV PCS-HEROIN | 475.054-2-2 | 02/07/2010 00:06 | CLACK | 1 | RASTETTER WRT # 19CR278633-B | REVOKED | Not Allowed | NO BAIL | | | |
| 7 | PCV PCS-HEROIN | 475.054-2-2 | 02/07/2010 00:06 | CLACK | 1 | RASTETTER WRT # 19CR21368-A | REVOKED | Not Allowed | NO BAIL | | | |
| 8 | THEFT I | 164.065-1-1 | 02/07/2010 00:06 | CLACK | 1 | PC | DISMISSED | \$30000 | TO POST | | | |
| 9 | THEFT I | 164.065-2-2 | 02/07/2010 00:06 | CLACK | 1 | PC | DISMISSED | \$30000 | TO POST | | | |
| 10 | POSSESS OF A STOLEN VEHICLE | 164.045-2-2 | 02/07/2010 00:06 | CLACK | 1 | PC | DISMISSED | \$30000 | TO POST | | | |
| 11 | TRAFFICK IN STOLEN VEH | 164.045-2-2 | 02/07/2010 00:06 | CLACK | 1 | PC | DISMISSED | \$30000 | TO POST | | | |
| 12 | POSSESS OF A STOLEN VEHICLE | 164.045-2-2 | 02/07/2010 00:06 | CLACK | 1 | RASTETTER DA # 20CR08467 | RELEASED | \$40000 | TO POST | | | |
| 13 | UNLAWFUL USE OF VEHICLE | 164.043-1-1 | 02/07/2010 00:06 | CLACK | 1 | DA # 20CR08467 | DISMISSED | \$0 | TO POST | | | |
| 14 | PCV THEFT III | 164.043-1-1 | 02/05/2010 00:06 | MCLAL | 1 | SNT # 18-32142 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 15 | PCV THEFT II | 164.045-1-1 | 02/05/2010 00:06 | MCLAL | 1 | SNT # 18-32142 | DISMISSED | Not Allowed | NO BAIL | | | |
| 16 | PCV THEFT III | 164.043-1-1 | 02/05/2010 00:06 | MCLAL | 1 | SNT # 18-32142 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 17 | PCV CRIM TRESPASS II | 164.245 | 02/05/2010 00:06 | MCLAL | 1 | SNT # 18-32142 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 18 | PCV THEFT II | 164.045 | 02/05/2010 00:06 | CLACK | 1 | RASTETTER SNT # 19CR07222 | REVOKED | Not Allowed | NO BAIL | | | |
| 19 | PCV CRIM MISCHIEF III | 164.245 | 02/05/2010 00:06 | CLACK | 1 | RASTETTER SNT # 19CR07222 | REVOKED | Not Allowed | NO BAIL | | | |
| 20 | PCV THEFT III | 164.043 | 02/05/2010 00:06 | CLACK | 1 | RASTETTER SNT # 19CR07222 | REVOKED | Not Allowed | NO BAIL | | | |
| 21 | PCV THEFT III | 164.043 | 02/05/2010 00:06 | CLACK | 1 | RASTETTER SNT # 19CR07222 | REVOKED | Not Allowed | NO BAIL | | | |
| Booked: 07/22/2010 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | PCV PCS-HEROIN | 475.054-1-1 | 07/22/2010 00:06 | CLACK | 1 | DA # 19CR18033 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 2 | PCV PCS-HEROIN | 475.054-1-1 | 07/22/2010 00:06 | CLACK | 1 | KAYS DET # 19CR21358 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 3 | FTA THEFT III | 164.043-1-1 | 07/25/2010 00:06 | MCLAL | 1 | WRT # 18-32142 | RECOGNIZED | \$15000 | TO POST | | | |
| 4 | FTA THEFT III | 164.043-1-1 | 07/25/2010 00:06 | MCLAL | 1 | WRT # 18-32142 | RECOGNIZED | \$0 | TO POST | | | |
| 5 | FTA CRIM TRESPASS II | 164.245 | 07/25/2010 00:06 | MCLAL | 1 | WRT # 18-32142 | RECOGNIZED | \$0 | TO POST | | | |
| 6 | FTA THEFT III | 164.043-1-1 | 07/25/2010 00:06 | MCLAL | 1 | WRT # 18-32142 | RECOGNIZED | \$15000 | TO POST | | | |
| Booked: 04/20/2010 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | PCV THEFT III | 164.043 | 04/20/2010 00:06 | MCLAL | 1 | WRT # 2019-32142 | RECOGNIZED | \$25000 | TO POST | | | |
| 2 | PCV CRIM TRESPASS II | 164.245 | 04/20/2010 00:06 | MCLAL | 1 | WRT # 2019-32142 | RECOGNIZED | \$0 | TO POST | | | |
| 3 | PCV THEFT III | 164.043 | 04/20/2010 00:06 | MCLAL | 1 | WRT # 2019-32142 | RECOGNIZED | \$15000 | TO POST | | | |
| Booked: 04/20/2010 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | OBSTRUCT GOVERNMENTAL ADMIN | 162.235 | 04/20/2010 19:00 | CLACK | 1 | PC | RELEASED | \$2500 | TO POST | | | |
| 2 | PCV PCS-HEROIN | 475.054 | 04/20/2010 19:00 | CLACK | 1 | KAYS DET # 18CR18533-01 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 3 | PCV PCS-METH | 475.054 | 04/20/2010 19:00 | CLACK | 1 | KAYS DET # 18CR18533-01 | TIME SERVED | Not Allowed | NO BAIL | | | |
| Booked: 04/15/2010 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | PCS-HEROIN | 475.054-2-2 | 04/15/2010 00:06 | CLACK | 1 | WRT # 19CR21358 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 2 | PCV PCS-HEROIN | 475.054-2-2 | 04/15/2010 00:06 | CLACK | 1 | WRT # 19CR21358 | TIME SERVED | Not Allowed | NO BAIL | | | |
| Booked: 02/22/2010 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | PCV PCS-HEROIN | 475.054-1-1 | 02/22/2010 00:06 | CLACK | 1 | KAYS DET # 19CR18033 | TIME SERVED | Not Allowed | NO BAIL | | | |
| Booked: 02/17/2010 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | FTA PCS-HEROIN | 475.054-2-2 | 02/17/2010 00:06 | CLACK | 1 | RASTETTER WRT # 19CR07222-3-A | TIME SERVED | Not Allowed | NO BAIL | | | |
| 2 | THEFT II | 164.045-1-1 | 02/22/2010 00:06 | CLACK | 1 | WEBER WRT # 19CR07222 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 3 | CRIM MISCHIEF III | 164.245 | 02/22/2010 00:06 | CLACK | 1 | WEBER WRT # 19CR07222 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 4 | THEFT III | 164.043-1-1 | 02/22/2010 00:06 | CLACK | 1 | WEBER WRT # 19CR07222 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 5 | THEFT II | 164.045-1-1 | 02/22/2010 00:06 | CLACK | 1 | WEBER WRT # 19CR07222 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 6 | THEFT III | 164.043-1-1 | 02/22/2010 00:06 | CLACK | 1 | WEBER WRT # 19CR07222 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 7 | THEFT III | 164.043 | 02/25/2010 00:06 | MCLAL | 1 | SNT # 2019-32142 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 8 | THEFT III | 164.045-2-2 | 02/25/2010 00:06 | MCLAL | 1 | SNT # 2019-32142 | DISMISSED | Not Allowed | NO BAIL | | | |
| 9 | THEFT III | 164.043-1-1 | 02/25/2010 00:06 | MCLAL | 1 | GRAFF SNT # 2019-32142 | TIME SERVED | Not Allowed | NO BAIL | | | |
| 10 | CRIM TRESPASS II | 164.245 | 02/25/2010 00:06 | MCLAL | 1 | GRAFF SNT # 2019-32142 | TIME SERVED | Not Allowed | NO BAIL | | | |
| Booked: 01/29/2010 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | CRIM TRESPASS II | 164.245 | 01/29/2010 00:06 | CLACK | 1 | PC | NO COMP | \$1500 | TO POST | | | |
| 2 | INTERFERING WITH PEACE OFFICER | 162.247 | 01/29/2010 00:06 | CLACK | 1 | PC | NO COMP | \$2500 | TO POST | | | |
| 3 | THEFT II | 164.045-1-1 | 01/29/2010 00:06 | MCLAL | 1 | WRT # 18-32142 | RECOGNIZED | \$10000 | TO POST | | | |
| 4 | THEFT III | 164.043-1-1 | 01/29/2010 00:06 | MCLAL | 1 | WRT # 18-32142 | RECOGNIZED | \$0 | TO POST | | | |
| 5 | THEFT III | 164.043-1-1 | 01/29/2010 00:06 | MCLAL | 1 | WRT # 18-32142 | RECOGNIZED | \$0 | TO POST | | | |
| 6 | CRIM TRESPASS II | 164.245 | 01/29/2010 00:06 | MCLAL | 1 | WRT # 18-32142 | RECOGNIZED | \$0 | TO POST | | | |
| Booked: 01/09/2010 | Name: KIMBLE HUTCH COBBIN | | | | | | | | | | | |
| 1 | PCS-HEROIN | 475.054-1-1 | 01/09/2010 12:04 | CLACK | 1 | PC | RECOGNIZED | \$2500 | TO POST | | | |



1. Base Service Entry – Civil Case - Court information

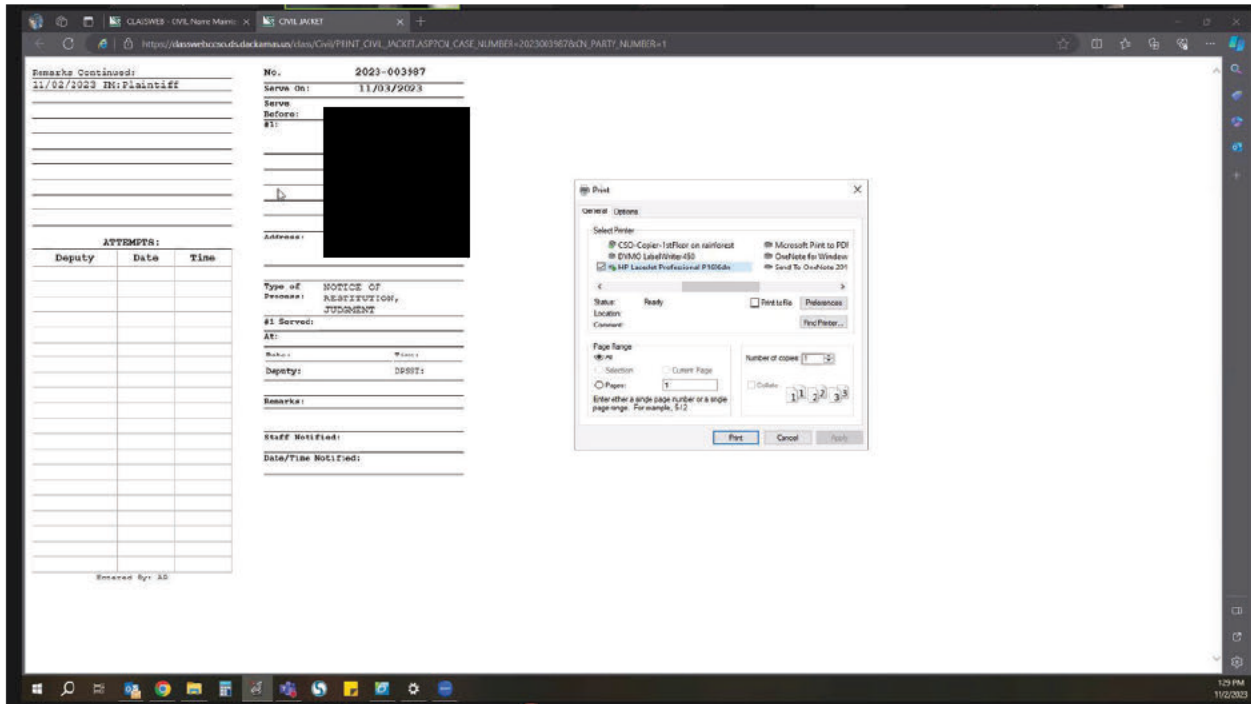
The screenshot shows the 'CIVIL Case Maintenance' form in a web browser. The 'File Number' is 23-003987. The 'Date Received' is 11/22/2023. The 'Time Received' is 5:26. The 'State' is OREGON, 'Court Number' is 23-117247, and 'Receipt Number' is 19332. The 'Comments' field contains 'COMES MAILED TO TENANTS 11/22/23'. The 'Info: AR' field is empty. The 'Received Via: P' field is empty. The 'Case Manager' is CGSR - USER.

2. Base Service Entry – Civil Names - Name and process(s)

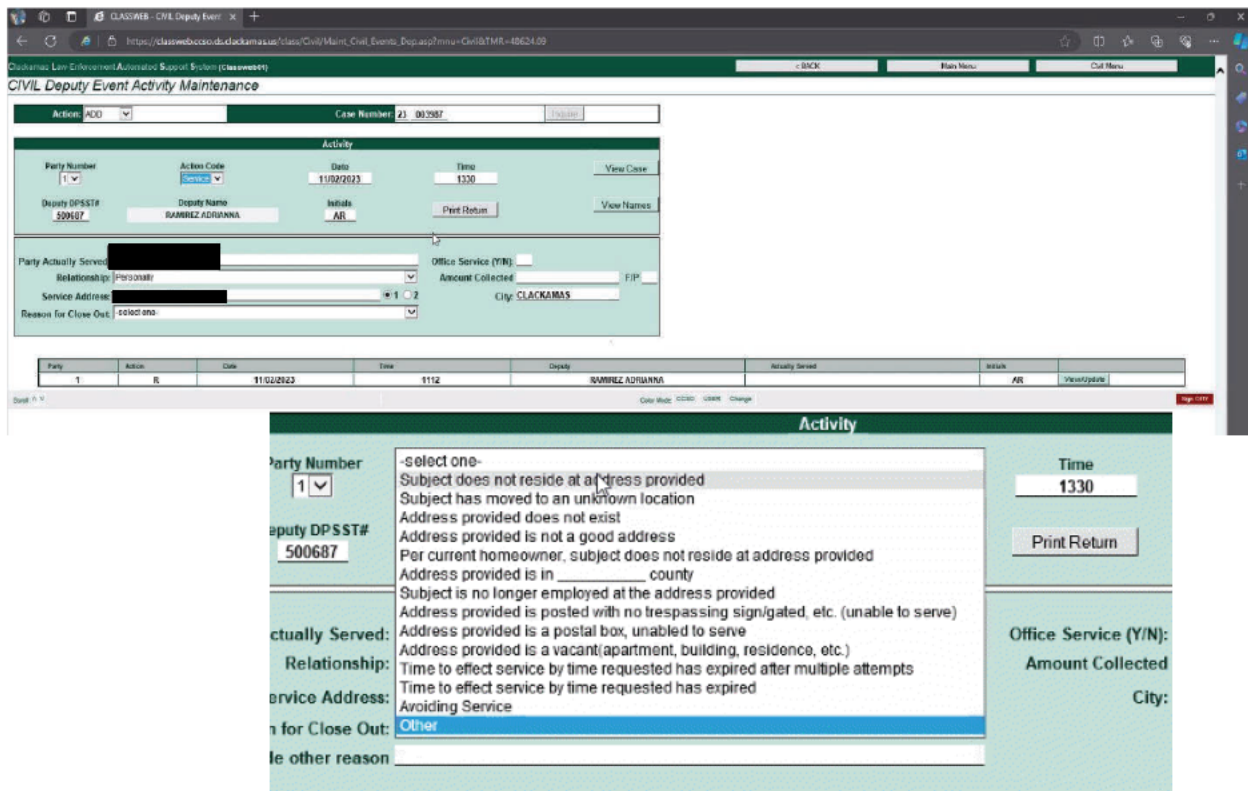
The screenshot shows the 'CIVIL Name Maintenance' form in a web browser. The 'Case Number' is 23-003987. The 'Party Number' is 1. The 'Name' is [REDACTED]. The 'Note' is 'SERVE OR POSTED NOT SUB-SERVE'. The 'Primary Address' is [REDACTED]. The 'Secondary Address' is [REDACTED]. The 'City' is CLACKAMAS. The 'Type of Process' is JUDGMENT (JUDG - 27). The 'Other Process Description' is [REDACTED]. The 'Serve Before' is [REDACTED]. The 'Witness Fees' is 0.00. The 'Time' is [REDACTED]. The 'District' is [REDACTED]. The 'Comments' field is empty. The 'Party List' table has one row with Party No. 1, Name [REDACTED], Address [REDACTED], P, 1, 0. The 'Type of Process' list includes: NOTICE RE: HEALTH CARE COVERAGE (NHCC - 69), NOTICE REGARDING WRITTEN RESPONSE (NRWR - 126), NOTICE TO APPEAR FOR PARENTAGE TESTS (NOTPT - 95), NOTICE TO CONSUMER OR EMPLOYEE AND OBJECTION (NOTCO - 130), NOTICE TO DEFENDANT(S) (NDEF - 121), NOTICE TO ELDERLY PERSON OR PERSON WITH DISABILITIES/OBJECTIONS AND REQUEST FOR HEARING (201 - 201), NOTICE TO PARTIES (246 - 246), NOTICE TO PARTIES PURSUANT TO ORS 107.092 (213 - 213), NOTICE TO PROVIDE CONTACT ADDRESS (RVIEW - 34), NOTICE TO RESPONDENT (NRESP - 58), NOTICE TO SUBPOENAED PARTY (N2SP - 127), NOTICE, OBJECTIONS AND REQUEST FOR HEARING (163 - 163), **OBJECTION TO MODIFYING SUPPORT (160 - 160)**, OBJECTION TO SUSPENDING/CREDITING SUPPORT (159 - 159), ORDER (ORDER - 9), ORDER AND NOTICE TO APPEAR (ORNOT - 107), ORDER FOR APPOINTMENT OF GUARDIAN AD LITEM (164 - 164), ORDER FOR LESS RESTRICTIVE TERMS (OLRT - 106), ORDER FOR TEMPORARY CUSTODY/PARENTING TIME (184 - 184), ORDER MODIFYING SUPPORT ORDER (OMSO - 150), ORDER MODIFYING SUPPORT ORDER AND JOINING A PARTY (210 - 210), ORDER OF ASSISTANCE (ORDAS - 47), ORDER OF IMMEDIATE DANGER & TEMPORARY CUSTODY AND PARENTING TIME (233 - 233), ORDER RENEWING RESTRAINING ORDER (RENEW - 108), ORDER TO APPEAR FOR JUDGMENT DEBTOR EXAM (HCORP - 36), ORDER TO APPEAR/DELINQUENT SUPPORT OBLIGOR (ORAP - 98), ORDER TO APPEAR, PROBATION REVOCATION (SP - 6), ORDER TO PREVENT SEXUAL ABUSE (SAPO - 116), ORDER TO SHOW CAUSE (ORDSC - 87), OTHER (OTHER - 38).



3. Base Service Entry – Civil Worksheet printout



4. Base Service Entry – Civil Event - Civil Activity/Completion of Service





5. Base Service Entry – Civil Fees and receipts

The screenshot displays the 'Civil Receipt Maintenance' application interface. The top window shows a form for entering receipt details, including fields for Receipt Number, Special Receipt Type, Sheriff Number, Date, and Fee Amount. The bottom window displays a list of civil receipts with columns for Line, Receipt No., Fee Number, Amount, and Description.

| Line | Receipt No. | Fee Number | Amount | Description |
|-----------|-------------|------------|---------|-------------|
| 1001-2021 | 10001 | 2021-00000 | \$50.00 | |
| 1002-2021 | 10002 | 2021-00000 | \$50.00 | |
| 1003-2021 | 10003 | 2021-00000 | \$50.00 | |
| 1004-2021 | 10004 | 2021-00000 | \$50.00 | |
| 1005-2021 | 10005 | 2021-00000 | \$50.00 | |
| 1006-2021 | 10006 | 2021-00000 | \$50.00 | |
| 1007-2021 | 10007 | 2021-00000 | \$50.00 | |
| 1008-2021 | 10008 | 2021-00000 | \$50.00 | |
| 1009-2021 | 10009 | 2021-00000 | \$50.00 | |
| 1010-2021 | 10010 | 2021-00000 | \$50.00 | |
| 1011-2021 | 10011 | 2021-00000 | \$50.00 | |
| 1012-2021 | 10012 | 2021-00000 | \$50.00 | |
| 1013-2021 | 10013 | 2021-00000 | \$50.00 | |
| 1014-2021 | 10014 | 2021-00000 | \$50.00 | |
| 1015-2021 | 10015 | 2021-00000 | \$50.00 | |
| 1016-2021 | 10016 | 2021-00000 | \$50.00 | |
| 1017-2021 | 10017 | 2021-00000 | \$50.00 | |
| 1018-2021 | 10018 | 2021-00000 | \$50.00 | |
| 1019-2021 | 10019 | 2021-00000 | \$50.00 | |
| 1020-2021 | 10020 | 2021-00000 | \$50.00 | |
| 1021-2021 | 10021 | 2021-00000 | \$50.00 | |
| 1022-2021 | 10022 | 2021-00000 | \$50.00 | |
| 1023-2021 | 10023 | 2021-00000 | \$50.00 | |
| 1024-2021 | 10024 | 2021-00000 | \$50.00 | |
| 1025-2021 | 10025 | 2021-00000 | \$50.00 | |
| 1026-2021 | 10026 | 2021-00000 | \$50.00 | |
| 1027-2021 | 10027 | 2021-00000 | \$50.00 | |
| 1028-2021 | 10028 | 2021-00000 | \$50.00 | |
| 1029-2021 | 10029 | 2021-00000 | \$50.00 | |
| 1030-2021 | 10030 | 2021-00000 | \$50.00 | |
| 1031-2021 | 10031 | 2021-00000 | \$50.00 | |
| 1032-2021 | 10032 | 2021-00000 | \$50.00 | |
| 1033-2021 | 10033 | 2021-00000 | \$50.00 | |
| 1034-2021 | 10034 | 2021-00000 | \$50.00 | |
| 1035-2021 | 10035 | 2021-00000 | \$50.00 | |
| 1036-2021 | 10036 | 2021-00000 | \$50.00 | |
| 1037-2021 | 10037 | 2021-00000 | \$50.00 | |
| 1038-2021 | 10038 | 2021-00000 | \$50.00 | |
| 1039-2021 | 10039 | 2021-00000 | \$50.00 | |
| 1040-2021 | 10040 | 2021-00000 | \$50.00 | |
| 1041-2021 | 10041 | 2021-00000 | \$50.00 | |
| 1042-2021 | 10042 | 2021-00000 | \$50.00 | |
| 1043-2021 | 10043 | 2021-00000 | \$50.00 | |
| 1044-2021 | 10044 | 2021-00000 | \$50.00 | |
| 1045-2021 | 10045 | 2021-00000 | \$50.00 | |
| 1046-2021 | 10046 | 2021-00000 | \$50.00 | |
| 1047-2021 | 10047 | 2021-00000 | \$50.00 | |
| 1048-2021 | 10048 | 2021-00000 | \$50.00 | |
| 1049-2021 | 10049 | 2021-00000 | \$50.00 | |
| 1050-2021 | 10050 | 2021-00000 | \$50.00 | |
| 1051-2021 | 10051 | 2021-00000 | \$50.00 | |
| 1052-2021 | 10052 | 2021-00000 | \$50.00 | |
| 1053-2021 | 10053 | 2021-00000 | \$50.00 | |
| 1054-2021 | 10054 | 2021-00000 | \$50.00 | |
| 1055-2021 | 10055 | 2021-00000 | \$50.00 | |
| 1056-2021 | 10056 | 2021-00000 | \$50.00 | |
| 1057-2021 | 10057 | 2021-00000 | \$50.00 | |
| 1058-2021 | 10058 | 2021-00000 | \$50.00 | |
| 1059-2021 | 10059 | 2021-00000 | \$50.00 | |
| 1060-2021 | 10060 | 2021-00000 | \$50.00 | |
| 1061-2021 | 10061 | 2021-00000 | \$50.00 | |
| 1062-2021 | 10062 | 2021-00000 | \$50.00 | |
| 1063-2021 | 10063 | 2021-00000 | \$50.00 | |
| 1064-2021 | 10064 | 2021-00000 | \$50.00 | |
| 1065-2021 | 10065 | 2021-00000 | \$50.00 | |
| 1066-2021 | 10066 | 2021-00000 | \$50.00 | |
| 1067-2021 | 10067 | 2021-00000 | \$50.00 | |
| 1068-2021 | 10068 | 2021-00000 | \$50.00 | |
| 1069-2021 | 10069 | 2021-00000 | \$50.00 | |
| 1070-2021 | 10070 | 2021-00000 | \$50.00 | |
| 1071-2021 | 10071 | 2021-00000 | \$50.00 | |
| 1072-2021 | 10072 | 2021-00000 | \$50.00 | |
| 1073-2021 | 10073 | 2021-00000 | \$50.00 | |
| 1074-2021 | 10074 | 2021-00000 | \$50.00 | |
| 1075-2021 | 10075 | 2021-00000 | \$50.00 | |
| 1076-2021 | 10076 | 2021-00000 | \$50.00 | |
| 1077-2021 | 10077 | 2021-00000 | \$50.00 | |
| 1078-2021 | 10078 | 2021-00000 | \$50.00 | |
| 1079-2021 | 10079 | 2021-00000 | \$50.00 | |
| 1080-2021 | 10080 | 2021-00000 | \$50.00 | |
| 1081-2021 | 10081 | 2021-00000 | \$50.00 | |
| 1082-2021 | 10082 | 2021-00000 | \$50.00 | |
| 1083-2021 | 10083 | 2021-00000 | \$50.00 | |
| 1084-2021 | 10084 | 2021-00000 | \$50.00 | |
| 1085-2021 | 10085 | 2021-00000 | \$50.00 | |
| 1086-2021 | 10086 | 2021-00000 | \$50.00 | |
| 1087-2021 | 10087 | 2021-00000 | \$50.00 | |
| 1088-2021 | 10088 | 2021-00000 | \$50.00 | |
| 1089-2021 | 10089 | 2021-00000 | \$50.00 | |
| 1090-2021 | 10090 | 2021-00000 | \$50.00 | |
| 1091-2021 | 10091 | 2021-00000 | \$50.00 | |
| 1092-2021 | 10092 | 2021-00000 | \$50.00 | |
| 1093-2021 | 10093 | 2021-00000 | \$50.00 | |
| 1094-2021 | 10094 | 2021-00000 | \$50.00 | |
| 1095-2021 | 10095 | 2021-00000 | \$50.00 | |
| 1096-2021 | 10096 | 2021-00000 | \$50.00 | |
| 1097-2021 | 10097 | 2021-00000 | \$50.00 | |
| 1098-2021 | 10098 | 2021-00000 | \$50.00 | |
| 1099-2021 | 10099 | 2021-00000 | \$50.00 | |
| 1100-2021 | 10100 | 2021-00000 | \$50.00 | |

EXHIBIT B
BUDGET

PRICING PROPOSAL

Agency: Clackamas County Sheriff's Office

Proposal Number: 230401 Rev 6

Address: 2206 Kaen Road

Proposal Creation Date: Jan 5, 2024

Address: Oregon City, OR 97045

Proposal Expiration Date: March 1, 2024

Contact: Tony Docekal, Technology Systems Manager (tdocekal@clackamas.us)

Prepared By: J. Lapin-Bertone

Telephone: 503-785-5050

Cust. Con.:

Summary Pricing

| | <u>Software Licensing</u> | <u>Services</u> | <u>1st Yr Support</u> |
|--|---------------------------|---------------------|-----------------------|
| Jail Management Software and Services | | | |
| Jail Management Software | \$222,530.00 | | \$44,506.00 |
| JMS Biometric Enhancements | \$15,400.00 | | \$3,080.00 |
| JMS ORLEDS Interface & Enhancements | \$31,660.00 | | \$6,332.00 |
| JMS External Interfaces | \$96,150.00 | | \$19,230.00 |
| JMS Customizations | | \$37,012.00 | \$6,780.00 |
| Test/Training Installation & Services | \$16,800.00 | | \$10,800.00 |
| JMS Project Services | | \$209,650.00 | |
| JMS Data Conversion | | \$22,680.00 | |
| Sub-Totals | \$382,540.00 | \$269,342.00 | \$90,728.00 |
| Total JMS (Licenses, Services & 1st Yr Support) | | \$742,610.00 | |

| | | | |
|---|--------------------|---------------------|--------------------|
| Records Management Software and Services (Civil, Warrants & Protection Orders) | | | |
| Civil, Warrants & Protection Orders Software | \$36,180.00 | | \$7,236.00 |
| Civil, Warrants & Protection Orders ORLEDS Interface | \$27,280.00 | | \$5,456.00 |
| Civil, Warrants & Protection Orders External Interfaces | \$18,480.00 | | \$3,696.00 |
| Civil, Warrants & Protection Orders Project Services | | \$28,790.00 | |
| Civil Data Conversion | | \$15,360.00 | |
| RMS & Civil Customizations | | \$15,116.00 | \$2,464.00 |
| Warrants & Protection Orders Data Conversion | | \$10,080.00 | |
| Sub-Totals | \$81,940.00 | \$69,346.00 | \$18,852.00 |
| Total Records Management (Licenses, Services & 1st Yr Support) | | \$170,138.00 | |

| | | | |
|----------------------------------|---------------------|---------------------|---------------------|
| Entire Project Sub-Totals | \$464,480.00 | \$338,688.00 | \$109,580.00 |
|----------------------------------|---------------------|---------------------|---------------------|

| | | |
|---|-----|---------------------|
| Due on Contact execution | 40% | \$365,099.20 |
| Due on Installation | 30% | \$273,824.40 |
| Due on Completion of training | 20% | \$182,549.60 |
| Due on Acceptance | 10% | \$91,274.80 |
| TOTAL PROJECT COST (WITH 1ST YEAR SUPPORT) | | \$912,748.00 |

PRICING PROPOSAL

Agency: Clackamas County Sheriff's Office

Address: 2206 Kaen Road

Address: Oregon City, OR 97045

Contact: Tony Docekal, Technology Systems Manager (tdocekal@clackamas.us)

Telephone: 503-785-5050

Proposal Number: 230401 Rev 6

Proposal Creation Date: Jan 5, 2024

Proposal Expiration Date: March 1, 2024

Prepared By: J. Lapin-Bertone

Cust. Con.:

Jail Management Software

BASE JMS FEATURES/MODULES

- SYSTEM SECURITY
- COMPREHENSIVE INQUIRY, SEARCH & RETRIEVAL
- ARREST, OFFENSE AND SENTENCE TRACKING
- BOND MANAGEMENT
- PROPERTY MANAGEMENT AND RELEASE
- MUG SHOTS AND PHOTO LINEUPS
- INMATE CLASSIFICATION AND ASSESSMENTS
- PREA ASSESSMENTS
- HOLD MANAGEMENT
- BOOKING COMPLETION CHECKS
- NOTIFICATIONS AND CONTACTS
- TASK TRACKING AND MANAGEMENT
- MEDICAL AND MENTAL HEALTH QUESTIONNAIRE
- JAIL INCIDENT REPORTING
- DISCIPLINARY REPORTING
- SENTENCE CALCULATION
- HOUSING MANAGEMENT & LOGS
- INMATE LOGS
- INMATE MOVEMENTS
- ALERTS AND CAUTIONS
- KEEPAWAYS
- VISITATION & VISITOR REGISTRATION/TRACKING
- TRANSPORTATION AND SCHEDULING
- RE-ENTRY TRACKING
- MEALS AND DIETARY RESTRICTIONS
- WORK RELEASE AND ALTERNATIVE SENTENCING
- PROFESSIONAL VISITORS
- REPORTING AND STATISTICS

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> | <u>SOW Ref</u> |
|---------------|--|-------------------|-----------------|--------------|----------------------|----------------|
| JMSSVC | JMS Application Server Software (Tier C) <i>This is the base JMS solution, including all the features listed above. Interfaces to other systems are either listed below or on the optional page.</i> | \$151,800.00 | 1 | \$151,800.00 | \$30,360.00 | SFTW 1 |
| JMSPREBKC | JMS Pre-Booking Web Interface <i>This provides for a web-based portal in which outside arresting agencies can enter information about a booking they will be bringing into the jail, and allow for transfer of that data into the JMS.</i> | \$15,840.00 | 1 | \$15,840.00 | \$3,168.00 | SFTW 5 |

PRICING PROPOSAL

Agency: Clackamas County Sheriff's Office

Address: 2206 Kaen Road

Address: Oregon City, OR 97045

Contact: Tony Docekal, Technology Systems Manager (tdocekal@clackamas.us)

Telephone: 503-785-5050

Proposal Number: 230401 Rev 6

Proposal Creation Date: Jan 5, 2024

Proposal Expiration Date: March 1, 2024

Prepared By: J. Lapin-Bertone

Cust. Con.:

| | | | | | | |
|----------|--|-------------|---|-------------|------------|--------|
| JMSDASH | ASP Dashboard HUB Server Software <i>This service provides for web-based dashboards as configured by the contract. The typical installation includes customized booking and release dashboards.</i> | \$3,520.00 | 1 | \$3,520.00 | \$704.00 | SFTW 3 |
| JMSEMUGC | Jail Management Advanced Imaging Module (Tier C) <i>This module allows for the JMS to control any open source network based camera, acquiring and adding NIST formatted mugshot images to the JMS database.</i> | \$3,520.00 | 1 | \$3,520.00 | \$704.00 | SFTW 2 |
| JMSASPC | JMS Public Web Viewer (Tier C) <i>This provides for a public facing agency configurable web site showing inmate demographic data as configured (i.e. only current inmates, no mugshots, etc)</i> | \$4,400.00 | 1 | \$4,400.00 | \$880.00 | SFTW 7 |
| JMSPKTC | JMS PocketJMS (Tier C) <i>This includes both the server and agency-wide licensed mobile client applications for performing JMS functions such as inmate lookup, log entries, movements & cell checks on an iOS or Android device. (Devices provided by agency)</i> | \$16,800.00 | 1 | \$16,800.00 | \$3,360.00 | SFTW 4 |
| EISSENGC | Notification Services Engine (SMS & SMTP) (Tier C) <i>Notification Services provides for the publication of automated email and text messages based on activity occurring within the supported systems. Notification Services are intended to support notifications outside of the internal system workflow engines and is specifically intended to provide an automated messaging capability to users not commonly accessing the system. Notification Services is comprised of the base engine, which resides on the system server and responds to triggering events defined within the supported systems, and a set of message templates that define the trigger event for each configured message type. Each message template is constructed to; identify a system activation trigger, support a standardized message (including both standardized text and system data), support a distribution method (email or SMS), and a message distribution list. The base engine must be purchased along with a set of message templates.</i> | \$14,000.00 | 1 | \$14,000.00 | \$2,800.00 | SFTW 8 |

PRICING PROPOSAL

Agency: Clackamas County Sheriff's Office

Address: 2206 Kaen Road

Address: Oregon City, OR 97045

Contact: Tony Docekal, Technology Systems Manager (tdocekal@clackamas.us)

Telephone: 503-785-5050

Proposal Number: 230401 Rev 6

Proposal Creation Date: Jan 5, 2024

Proposal Expiration Date: March 1, 2024

Prepared By: J. Lapin-Bertone

Cust. Con.:

| | | | | | | |
|------------------|--|-------------|---|-----------------|---------------------|--------------------|
| NSTRANPAK | Notification Services Message Template (Pack of 10) <i>This is a supplement to the Notification Services Engine. This allows an agency to utilize additional templates for scheduled and on-demand notifications (E-Mail & SMS) beyond the two templates included with installation.</i> | \$12,650.00 | 1 | \$12,650.00 | \$2,530.00 | SFTW 8a |
| | | | | JMS Base | \$222,530.00 | \$44,506.00 |

Jail Management Software - Biometric Enhancements

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> | <u>SOW Ref</u> |
|---------------|---|-------------------|-----------------|----------------------------|----------------------|-------------------|
| EISFP-JMSC | Fingerprint Authentication Service - JMS (Tier C) <i>The JMS Fingerprint Verification engine provides a biometric enrollment and matching capability designed to quickly identify subjects based on the inmate's fingerprint characteristics. The fingerprint verification technology is deployed as an integrated part of the JMS and accessible from the operational screens in the JMS. This simplifies the officers' interaction with the fingerprint devices and eliminates complex interfaces and provides an array of identity features within the Jail environment.</i> | \$15,400.00 | 1 | \$15,400.00 | \$3,080.00 | SFTW 14 & 15 |
| | | | | JMS Biometric Total | \$15,400.00 | \$3,080.00 |

- Provide subject identification during intake – This will allow officers to search previous booking records based on an associated fingerprint
- Provide rapid inmate validation – This would be used during release to ensure the inmate being processed is related to the inmate's data record in the JMS.
- Provide biometric technology consistent with current law enforcement standards for fingerprint processing and that is extensible for future applications.

PRICING PROPOSAL

Agency: Clackamas County Sheriff's Office

Address: 2206 Kaen Road

Address: Oregon City, OR 97045

Contact: Tony Docekal, Technology Systems Manager (tdocekal@clackamas.us)

Telephone: 503-785-5050

Proposal Number: 230401 Rev 6

Proposal Creation Date: Jan 5, 2024

Proposal Expiration Date: March 1, 2024

Prepared By: J. Lapin-Bertone

Cust. Con.:

Jail Management Software - ORLEDS / NCIC Interface & Enhancements

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> | <u>SOW Ref</u> |
|--|--|-------------------|-----------------|--------------------|----------------------|------------------|
| MATXC | M2 Matrix Switch Server Software (Tier C) <i>This software is required for the JMS & RMS systems to share data bi-directionally between themselves and the optional interfaces.</i> | \$13,860.00 | 1 | \$13,860.00 | \$2,772.00 | SFTW 13 |
| JMSN-ORLEDS | ORLEDS M2 Adapter - JMS <i>This interface allows for query of ORLEDS/NCIC via the M2 Message Switch from data contained within JMS (Persons Queries, Wants/Protection Orders/Criminal History) or data separately entered.</i> | \$6,600.00 | 1 | \$6,600.00 | \$1,320.00 | INTR13.a |
| TXTDATC | Text to Data Engine (Tier C) <i>The Text to Data engine is an interface component providing a system level parsing service. The engine is used to convert serial text to data elements that can be users within the EIS applications to reduce or eliminate manual data entry. The Text to Data engine can accept data from text-based documents (e.g. NCIC/ORLEDS returns), scannable credentials (e.g. Drivers Licenses) or other serialized text data sources. The Text to Data engine is a required core component in addition to the desired set of data mapping templates.</i> | \$8,800.00 | 1 | \$8,800.00 | \$1,760.00 | SFTW 6 & INTR 14 |
| AAMVDAT - OR | Data Map Template (Oregon State DL/ID) | \$1,200.00 | 1 | \$1,200.00 | \$240.00 | INTR14.1 |
| AAMVDAT - WA | Data Map Template (Washington State DL/ID) | \$1,200.00 | 1 | \$1,200.00 | \$240.00 | INTR14.2 |
| JMS ORLEDS/NCIC Interface Total | | | | \$31,660.00 | \$6,332.00 | |

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Cust. Con.:

Jail Management Interfaces

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> | <u>SOW Ref</u> |
|---------------|---|-------------------|-----------------|--------------|----------------------|----------------|
| JMSCOM | JMS Inmate Phone Initiation Interface (GTL/Via-Path) <i>This interface provides for the export of inmate demographic data to your GTL/Via-Path phone solution, saving the deputy time by not having to re-enter previously collected data.</i> | \$6,600.00 | 1 | \$6,600.00 | \$1,320.00 | INTR 1 |
| JMSLVS | JMS LiveScan Export Transfer Interface (Idemia) <i>This interface provides for the export of demographic data necessary for a Livescan submission, saving the deputy the time to re-enter previously collected data.</i> | \$6,600.00 | 1 | \$6,600.00 | \$1,320.00 | INTR 2 |
| JMSDWKIMP | JMS Livescan data import and validation (FBI, SID, etc.) <i>This interface provides for receiving the response of an FBI & SID # and identify from a Livescan submission and adding that information to an inmate record upon review by user.</i> | \$4,950.00 | 1 | \$4,950.00 | \$990.00 | INTR 3 |
| JMSKEF | JMS Inmate Commissary Interface (Keefe) <i>This interface provides for the export of inmate demographic data to your Keefe commissary/accounting solution, saving the deputy time by not having to re-enter previously collected data.</i> | \$6,600.00 | 1 | \$6,600.00 | \$1,320.00 | INTR 4 |
| JMSNAPCEMR | JMS NaphCare Export Interface (Inmate demographics) <i>This interface provides for the export of inmate demographic data to your NaphCare EMR solution, saving the deputy or medical staff time by not having to re-enter previously collected data.</i> | \$6,600.00 | 1 | \$6,600.00 | \$1,320.00 | INTR 5 |
| | JMS NaphCare Import Interface (Restrictions, Alerts) <i>This interface can import data into inmate records such as restrictions (housing, activity, etc) and/or alerts (diabetic, mental health, etc) from the NaphCare EMR system. (Subject to NaphCare exporting necessary dataset & customer specifications)</i> | \$9,900.00 | 1 | \$9,900.00 | \$1,980.00 | INTR 6 |
| | JMS X-Ray Export (B-Scan) <i>This interface provides for the export of inmate demographic data to your X-Ray BScan solution, saving the deputy time by not having to re-enter previously collected data.</i> | \$6,600.00 | 1 | \$6,600.00 | \$1,320.00 | INTR 7 |

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Cust. Con.:

| | | | | | | |
|----------|--|-------------|---|--------------------------------------|---------------------|--------------------|
| JMSCIROS | JMS Court Appearance Import (Odyssey) <i>This interface imports court events from Odyssey into the inmate's schedule, allowing for reports and planning for transportation and housing officers. (Subject to Odessey providing dataset to customer)</i> | \$16,000.00 | 1 | \$16,000.00 | \$3,200.00 | INTR 8 |
| | JMS State Benefits (EOD) Reporting Required Export <i>This interface provides the required export file for the State of Oregon for notification of custody for social benefits management.</i> | Included | 1 | \$0.00 | \$0.00 | INTR 9 |
| | JMS Mark43 Arrest Data Import <i>This interface would import arrest subject demographic and charge data into the Pre-Booking module, allowing for users to transfer into a booking record upon review without the need for re-entry. (Subject to release/access of Mark43 data)</i> | \$16,000.00 | 1 | \$16,000.00 | \$3,200.00 | INTR 10 |
| | JMS Sylogist Victim Notification Export <i>This interface exports inmate custody status data to the Sylogist solution for victim notification purposes.</i> | \$8,700.00 | 1 | \$8,700.00 | \$1,740.00 | INTR 11 |
| JMSORCJC | JMS OR CJC PSC Scoring Send/Return Interface <i>This interface sends the SID# of the inmate on demand to the Oregon CJC PSC Web site for the purposes of returning a recidivism score based on the prior conviction data associated with the SID# in the state's databases and their formula. That score is then populated into a field on the inmate classification screen.</i> | \$7,600.00 | 1 | \$7,600.00 | \$1,520.00 | INTR 12 |
| JMSSSA | JMS SSA Report Interface <i>This interface exports an inmate demographic data file to submit to the Social Security Administration.</i> | Included | 1 | \$0.00 | \$0.00 | INTR 13 |
| | | | | JMS Interfaces | \$96,150.00 | \$19,230.00 |
| | | | | Estimated Jail Software Total | \$365,740.00 | \$73,148.00 |

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Cust. Con.:

RMS Modules

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> | <u>SOW Ref</u> |
|---------------|--|-------------------|-----------------|-----------------|----------------------|-------------------|
| | RMS Application Server - Warrants & Protection Order Modules Only <i>This is the base RMS server configured for use only of the warrants & protection order modules. Agency-wide client application licenses are included.</i> | \$16,000.00 | 1 | \$16,000.00 | \$3,200.00 | SFTW 9 & 10 |
| CIVNETC | Civil Application Server <i>This is an agency license for the EIS Civil application, with functionality including subpoena tracking, eviction processing, and property seizure and sales workflow. Agency-wide client application licenses are included.</i> | \$16,000.00 | 1 | \$16,000.00 | \$3,200.00 | SFTW 11 |
| CIVSWEB | Civil Application Web Client Software <i>This software provides for a web interface for field users of the Civil application, allowing for real-time inquiry of service assignment data and real-time updating. This is specifically designed for mobile applications with limited bandwidth and does not require any local device installation.</i> | \$4,180.00 | 1 | \$4,180.00 | \$836.00 | SFTW 12 |
| | | | | RMS Base | \$36,180.00 | \$7,236.00 |

RMS - ORLEDS / NCIC Interface

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> | <u>SOW Ref</u> |
|---------------|---|-------------------|-----------------|--------------|----------------------|----------------|
| MATXC | M2 Matrix Switch Server Software (Tier C) Included on JMS Page | | | | | |
| RMSN-ORLEDS | ORLEDS M2 Adapter - RMS | Included | 1 | \$0.00 | \$0.00 | INTR13.b |
| ORLEDSQ | ORLEDS Inquiry Adapter <i>Data selected by the user can be automatically entered into various message keys which are applicable to the module or application.</i> | \$4,400.00 | 1 | \$4,400.00 | \$880.00 | INTR 15 |
| ORLEDESE | ORLEDS Entry Adapter <i>Data entered by a user can be transferred to various entry message keys based on field mapping for the specific screen and message key.</i> | \$8,800.00 | 1 | \$8,800.00 | \$1,760.00 | INTR 15 |
| | Additional Inquiry Message Keys | \$880.00 | 8 | \$7,040.00 | \$1,408.00 | INTR 15 |

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Cust. Con.:

| | | | | | |
|--|------------|---|--------------------|-------------------|---------|
| Additional Entry Message Keys | \$1,760.00 | 4 | \$7,040.00 | \$1,408.00 | INTR 15 |
| RMS ORLEDS/NCIC Interface Total | | | \$27,280.00 | \$5,456.00 | |

RMS - Interfaces

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> | <u>SOW Ref</u> |
|--|--|-------------------|-----------------|--------------------|----------------------|----------------|
| JMSCTWAR | Courts/Prosecutors Odyssey Warrant Import Interface <i>This interface receives demographics data from the Odyssey Courts systems on issued warrants, the subjects and the associated charges. The exact functionality is dependent on what data the court system will provide and how the agency configures their warrants workflow.</i> | \$18,480.00 | 1 | \$18,480.00 | \$3,696.00 | INTR 16 |
| RMS Interfaces Total | | | | \$18,480.00 | \$3,696.00 | |
| Estimated Civil & Warrants Software Total | | | | \$81,940.00 | \$16,388.00 | |

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Prepared By: J. Lapin-Bertone

Telephone: 503-785-5050

Cust. Con.:

Test/Training Installation & Services

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> | <u>SOW Ref</u> |
|--------------------------------------|---|-------------------|-----------------|--------------------|----------------------|----------------|
| JMSTEST | <p>Test/Train Instance & Configuration</p> <p><i>This is a separate installation of the JMS Base Server, RMS Base Server (Warrants & Protection Orders Limited), & Civil Application Server for the purposes of agency testing and training. Most interfaces will not be configured. The scope of work document will outline specific interfaces which will work on this instance and those that can only work on the production install. The initial dataset is replicated and the annual support and maintenance cost covers bi-annual replication of data from the production installation of the JMS/RMS/Civil database and support and maintenance on the test/training installation. Additional data replications beyond bi-annual are billed at cost of \$220/hr.</i></p> | \$16,800.00 | 1 | \$16,800.00 | \$10,800.00 | IFCG 6.a |
| Estimated Test/Training Total | | | | \$16,800.00 | \$10,800.00 | |

PRICING PROPOSALAgency: **Clackamas County Sheriff's Office**Address: **2206 Kaen Road**Address: **Oregon City, OR 97045**Contact: **Tony Docekal, Technology Systems Manager (tdocekal@clackamas.us)**Telephone: **503-785-5050**Proposal Number: **230401 Rev 6**Proposal Creation Date: **Jan 5, 2024**Proposal Expiration Date: **March 1, 2024**Prepared By: **J. Lapin-Bertone**

Cust. Con.:

Data Conversion - Estimate from AS/400 db2 System (SQL Database Format)

Any preliminary pricing included in this proposal is merely provided as an estimate of possible cost and to provide your agency with any overview of how EIS conducts data conversion development. Detailed information, including a sample of your data output is required regarding your project and database to determine a firm, fixed cost proposal.

| | | | <u>TOTAL</u> | <u>SOW Ref</u> |
|------|---|-------------|--------------|----------------|
| SRV6 | Data Conversion - SQL JMS with booking, mugshots, charge and inmate demographic data | 108 hrs est | \$22,680 | DCON 1 & 2 |
| SRV6 | Data Conversion - SQL Warrants & Protection Orders data | 48 hrs est | \$10,080 | DCON 3 |
| SRV6 | Data Conversion - SQL Civil (ClassWeb) service data | 48 hrs est | \$10,080 | DCON 4 |
| SRV6 | Data Conversion - SQL Civil Real Property | 24 hrs est | \$5,280 | DCON 4 |
| | Data Conversion Services provided at standard rate of \$210.00/hour USD. | | | |

EIS Responsibilities

- Conduct the Data Discovery phase of the project by working with Customer subject matter expert(s) to complete a data field mapping.
- Develop the conversion code.
- A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert will still be kept in a notes field for historical reference.
- Provide to the Customer example conversion data in the form of a useable EIS database.
- Project Manager will assist in the data review with the Customer and define Data Acceptance tests.
- Redevelop the conversion code as specified by change request during the Review and Sign-Off phase.

Agency Responsibilities

- Provide conversion database(s) to EIS as mutually agreed.
- Provide subject matter expert(s) who know the data being converted. The subject matter expert(s) will work with EIS during the Data Discovery and Review and Sign-Off phases.
- Review the example conversion data and provide change requests or sign-off within ten (10) business days.
- After completion, any changes to the data must be made by manual data entry by the Customer or agree to a Change Order.
- Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS system.
- Provide final Customer conversion database(s)

PRICING PROPOSAL

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Cust. Con.:

Professional Services**JMS Project Services - Installation & Training**

| <u>Part #</u> | <u>Description</u> | <u>Service Fee</u> | <u>Units</u> | | <u>SOW Ref</u> |
|--|---|--------------------|--------------|---------------------|----------------|
| SRVH1 | Project Management & Coordination Services (per hr) | \$210.00 | 240 | \$50,400.00 | PO & PP |
| SRVH7 | Installation Services (per hr) | \$210.00 | 80 | \$16,800.00 | HW1-4 |
| SRVH6 | System Configuration Services (per hr) | \$210.00 | 160 | \$33,600.00 | ICFG 1-6 |
| SRVH22 | Dashboard Configuration Services (Dash Forms) | \$2,600.00 | 10 | \$26,000.00 | ICFG 5 |
| SRV2 | Technical Services (Discretionary) | \$210.00 | 160 | \$33,600.00 | DEV 1 |
| SRVH4 | County Specific Report Development (each) | Included | 20 | Included | ICFG2 |
| SRVH4 | County Specific Report Development (each) | \$500.00 | 20 | \$10,000.00 | ICFG2 |
| ITJMSTA | JMS System Training - Admin/Sys Mgmt (per 8 hours) | \$1,680.00 | 1 | \$1,680.00 | TRN 1 |
| ITJMSTA | JMS System Training - End Users & Supervisors (per 8 hrs) | \$1,680.00 | 8 | \$13,440.00 | TRN 1 |
| ITJMSTA | JMS/RMS Training - SSRS Class for both Systems | \$1,680.00 | 1 | \$1,680.00 | TRN 1 |
| SRV5 | Travel & Per Diem | | | \$22,450.00 | PO & PP |
| JMS Project Management Services Sub-Total | | | | \$209,650.00 | |

Civil, Warrants & Protection Orders Project Services - Installation & Training

| <u>Part #</u> | <u>Description</u> | <u>Service Fee</u> | <u>Units</u> | | |
|---|--|--------------------|--------------|---------------------|-----------|
| SRVH1 | Project Management & Coordination Services (per hr) | \$210.00 | 48 | \$10,080.00 | PO & PP |
| SRVH7 | Installation Services (per hr) | \$210.00 | 32 | \$6,720.00 | PO & PP |
| ITJMSTA | RMS System Training - Admin/Sys Mgmt (per 8 hours) | \$1,680.00 | 1 | \$1,680.00 | TRN 2 - 3 |
| ITRMST | RMS System Training - Civil & Warrants Users (per 8 hours) | \$1,680.00 | 2 | \$3,360.00 | TRN 2 - 3 |
| SRVH4 | County Specific Report Development (each) | \$500.00 | 6 | \$3,000.00 | ICFG 3 |
| SRV5 | Travel & Per Diem | | | \$3,950.00 | PO & PP |
| Civil, Warrants & Protection Orders Project Services Sub-Total | | | | \$28,790.00 | |
| Project Services Total | | | | \$238,440.00 | |

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Cust. Con.:

| <i>Training Calculation</i> | | | |
|------------------------------------|-------|------------|---------|
| Application | Users | Class Size | Classes |
| JMS - End Users & Supervisors | 160 | 20 | 8 |
| RMS - Warrants & Protection Orders | 12 | 20 | 1 |
| RMS - Civil | 12 | 20 | 1 |

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Cust. Con.:

Software Customization Services

| <u>Part #</u> | <u>Description</u> | <u>TOTAL</u> | <u>Support - Std</u> | <u>SOW Ref</u> |
|---------------------------------------|---|--------------------------------------|----------------------|-------------------|
| Jail Management Customizations | | | | |
| SRVH11 | Day/Night Mode Pre-Book | \$0.00 * | | DEV1a |
| SRVH11 | Program Scheduling | \$3,520.00 ** | \$704.00 | DEV1b |
| SRVH11 | Inmate Mail processing recording/tracking capability | \$7,040.00 ** | \$1,408.00 | DEV1c |
| SRVH11 | JMS Printing UI | \$0.00 * | | DEV1d |
| SRVH11 | Sgt's Assessment review | \$1,760.00 ** | | DEV1e |
| SRVH11 | Sgt's Arrest Affidavit review and approval | \$1,760.00 ** | | DEV1f |
| SRVH11 | TOC to location | \$0.00 * | | DEV1g |
| SRVH11 | Electronic Home detention Module Browser Based data collection | \$7,040.00 ** | \$1,408.00 | DEV1h |
| SRVH11 | Naphcare automatic task clearance transaction (enhancement to Naphcare Interface) | \$3,520.00 ** | \$704.00 | DEV1i |
| SRVH11 | PocketJMS Overdue Cell Checks color change | \$0.00 * | | DEV1j |
| SRVH11 | PocketJMS Headcount | \$0.00 ** | | DEV1k |
| SRVH11 | JMS Custom inmate booking summary RDL (Custom SSRS report) | \$500.00 ** | | DEV1l |
| SRVH11 | Court Release Paper notificaton send (10 pack Notification Service templates)(discounted) | \$7,500.00 ** | \$1,500.00 | DEV1m |
| SRVH11 | Audible tone in ASP Cell Check Dashboard | \$1,760.00 ** | | DEV1n |
| SRVH11 | Sentence Calculator enhancements | \$5,280.00 ** | \$1,056.00 | DEV1o |
| SRVH11 | Inmate Charge History Report (Custom SSRS report) | \$500.00 ** | | DEV1p |
| | | JMS Dev Service Discount | -\$3,168.00 | |
| | | Estimated Jail Software Total | \$37,012.00 | \$6,780.00 |

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Cust. Con.:

RMS/Civil Management Customizations

| | | | | |
|--------|---|---------------|------------|-------|
| SRVH11 | Warrant Module AM Message Prefill | \$3,520.00 ** | \$704.00 | DEV2a |
| SRVH11 | Warrant Module Miscellaneous field add data template options | \$1,760.00 ** | | DEV2b |
| SRVH11 | Warrant Module Name forced refresh | \$0.00 * | | DEV2c |
| SRVH11 | Warrant Module Daily Activity Report | \$750.00 ** | | DEV2d |
| SRVH11 | Civil Process Provide a streamlined form data entry/management UI component | \$5,280.00 ** | \$1,056.00 | DEV2e |
| SRVH11 | Civil Process Custom SSRS RDL Civil Worksheet (Custom SSRS report) | \$500.00 ** | | DEV2f |
| SRVH11 | Civil Process Simple receipt and payment management | \$0.00 * | | DEV2g |
| SRVH11 | Civil Process Address validation | \$1,750.00 ** | | DEV2h |
| SRVH11 | Civil Activity report to Excel (Custom SSRS report) | \$500.00 ** | | DEV2i |
| SRVH11 | Civil.WEB update service completion data collection. | \$3,520.00 * | \$704.00 | DEV2j |

| | |
|---|--------------------|
| RMS Dev Service Discount | -\$2,464.00 |
| Estimated Records Software Total | \$15,116.00 |
| | \$2,464.00 |

* No added charge for development item. Dev deliverable included in initial proposal or previously negotiated

** Includes partial development items previously negotiated with scope increase related to additional UI development work.

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Cust. Con.:

System Support Matrix

System Support Cost Calculations

1. EIS warrants the system software, customizations and services with standard EIS provided tier 1 7X24 warranty service. Year one warranty begins on system installation for a period of 12 calendar months. First year support cost included in system purchase pricing.

and custom interfaces, based the module price for system software on the products licensed by the Agency.

2. Installation, Training and other Professional Services will not be included in the support calculations.

Calculated Support Costs for On-going Support and Maintenance

| | First Year | 2nd Year |
|--------------|---------------|---------------|
| Support Cost | \$ 109,580.00 | \$ 115,059.00 |

PRICING PROPOSAL

Agency: **Clackamas County Sheriff's Office**

Proposal Number: **230401 Rev 6**

Address: **2206 Kaen Road**

Proposal Creation Date: **Jan 5, 2024**

Address: **Oregon City, OR 97045**

Proposal Expiration Date: **March 1, 2024**

Contact: **Tony Docekal, Technology Systems Manager (tdocekal@clackamas. Prepared By: J. Lapin-Bertone**

Telephone: **503-785-5050**

Cust. Con.:

Notes to Pricing

1. This proposal is submitted to the Agency by Executive Information Services, Inc. This proposal will expire as noted in the expiration date, unless extended by Executive Information Services, Inc.
2. Unless contractually negotiated otherwise, system price is based on a payment schedule of forty (40) percent upon contract execution, balance of hardware price on date of delivery, and balance of contract price upon delivery of individual components.
3. All prices are FOB Destination. Sale prices quoted are exclusive of any state, local, use, or other applicable taxes. Hardware prices do not include shipping charges which will be added to the invoice.
4. Software pricing quoted is for a fully paid license for specified use on a networked computing system within the contract agency and is supplied subject to execution of a separate licensing and non-disclosure agreement which prohibits distribution, re-sale, or other disclosure outside of contracting agency. Full site licensing is included for the agency and there are no restrictions on the number of deployed workstations or users of the system within the agency.
5. All computing hardware, operating systems, database management systems, facility modifications, communications circuits, and network components not expressly provided in this proposal are the responsibility of the Agency.
6. Installation includes application software installation on user supplied computing platform, all table configuration, end-user training, network configuration, and similar activity. Installation also includes general network design consulting, network configuration, and installation and/or configuration of operating system software; including the Windows operating system and Microsoft SQL Server database management system. Agency is responsible for insuring that personnel are available and free of regular duty assignments during scheduled training periods. Training will require approximately 8 hours per person.
7. A 12 month warranty has been included in the proposal from date of regularly scheduled use in the Department. This is implemented as a normal service contract, which provides unlimited telephone consulting, minor software, updates, and periodic on-site visits for remedial maintenance and follow up training and consulting. Optional service packages are available, including full facilities management with dedicated on-site systems personnel.

EXHIBIT C
Washington County Contract 20-0095



PERSONAL / PROFESSIONAL SERVICES CONTRACT

This contract is between Washington County, a political subdivision of the State of Oregon (“County”), and Executive Information Services, Inc (EIS, Inc) (“Contractor”).

County and Contractor, in consideration of the mutual promises, terms and conditions provided herein, agree to the following:

SECTION 1 - PURPOSE AND STANDARD OF SERVICES

- 1.1 This contract sets forth the responsibilities and clarifies the relationship between the County and the Contractor.
- 1.2 Services performed by Contractor shall be performed to the standards described in Section 30 of the County Contract Terms and Conditions below.

SECTION 2 - CONSIDERATION

- 2.1 Contractor shall perform the work described in Attachment A, in consideration for which County agrees to pay for the work in the manner as further described in this contract.
- 2.2 The maximum amount payable under this contract is \$ 785,170.00; unless otherwise amended. Contractor bears the risk of non-payment for services in excess of the amount stated above without prior County approval; but County reserves the right to ratify and pay for such services in its sole discretion.
- 2.3 If applicable, payments based upon hourly rates or other measurements and provisions for travel expenses are set forth and identified in Attachment A.
- 2.4 Unless otherwise stated in Attachment A, the payment terms are thirty days after invoice approval by the County Contract Administrator.

SECTION 3 – CONTRACT TERM

- 3.1. The effective date is: 1/10/2020, or upon final signature, whichever is later.
- 3.2. The expiration date is: 1/10/2021, unless otherwise amended.
- 3.3. Passage of the contract expiration date shall not extinguish or prejudice the County's right to enforce this contract with respect to any default or defect in performance that has not been cured.

SECTION 4 – ADDITIONAL DOCUMENTS AND ATTACHMENTS

4.1 The following documents are incorporated into this contract:

- Solicitation # 2019.050P.
- Contractor's response dated _____.

4.2 The following Attachments are incorporated into and made a part of this contract:

- Attachment A – Statement of Work/Schedule/Payment Terms
- Attachment B - Modifications to Contract Terms and Conditions
- Attachment C - Modifications to Standard Insurance Requirements
- Attachment D - Federal Certifications
- Attachment E - State Insurance Program Requirements
- Attachment F – Business Associate Agreement
- Attachment G – PREA Policy Agreement
- Attachment J - Catalog of Federal Domestic Assistance
- Attachment Other – Prevailing Wage Standards
- Attachment Other - G- EIS Sales, Service and License Agreement
- Other - _____

4.3 In the event there is a conflict between the documents comprising this contract, the following order of precedence shall apply: the terms and conditions in the body of this contract, as modified by Attachment B, Attachment C, Attachment D, Attachment E, Attachment J and Prevailing Wage Standards; Attachment A; the remaining attached items checked in section 4.2; the Solicitation; and Contractor's response.

SECTION 5- COUNTY CONTRACT ADMINISTRATOR

Contract Administrator Name: Wayne Flynn

Telephone: 503-846-8053

Email: Wayne_Flynn@co.washington.or.us

Address: 155 N First Ave, Suite B-14, Mailstop: 1

City/State/ZIP: Hillsboro, OR 97123

CONTRACT TERMS AND CONDITIONS

1. **Subcontracts and Assignment.** Contractor shall not enter into any subcontracts for any of the work required by this contract or assign or transfer any of its interest in this contract, without the prior written notice to County. County shall have 10 working days to object. The provisions of this contract shall be binding upon and shall inure to the benefit of the parties hereto, and their respective successors and assigns, if any.
2. **Third Party Beneficiaries.** County and Contractor are the only parties to this contract and are the only parties entitled to enforce its terms. Nothing in this contract gives, is intended to give, or shall be construed to give or provide any benefit or right, whether directly, indirectly, or otherwise, to third persons unless such third persons are individually identified by name herein and expressly described as intended beneficiaries of the terms of this contract.
3. **Written Notice.** Any notice of change, termination, or other communication having a material effect on this contract shall be upon the County Contract Administrator and the Contractor Contact Person and served in one of the following manners: a) In-person delivery; or b) deposited in the U.S. Mail under certified or registered handling, postage prepaid. Except as provided in this contract, it is agreed that fifteen calendar days shall constitute reasonable notice for the exercise of any right in the event that applicable law specifically requires such notice.
4. **Governing Law/Venue/Attorney Fees.** This contract shall be governed by and construed in accordance with the laws of the State of Oregon without regard to principles of conflicts of law. Any claim, action, suit or proceeding (collectively, "Claim") between County and Contractor that arises from or relates to this contract shall be brought and conducted solely and exclusively within the Circuit Court of Washington County for the State of Oregon; provided, however, if a Claim is brought in a federal forum, then it shall be brought and conducted solely and exclusively within the United States District Court for the District of Oregon. CONTRACTOR, BY EXECUTION OF THIS CONTRACT, HEREBY CONSENTS TO THE IN PERSONAM JURISDICTION OF SAID COURTS. Each party shall be responsible for its own costs and attorney fees for any claim, action suit or proceeding, including any appeal.
5. **Remedies Cumulative.** All rights and remedies of County and Contractor shall be cumulative and may be exercised successively or concurrently. The foregoing is without limitation to or waiver of any other rights or remedies of County according to law.
6. **Severability/Waiver.** County and Contractor agree that, if any term or provision of this contract is declared by a court of competent jurisdiction to be illegal or in conflict with any law, the validity of the remaining terms and provisions shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the contract did not contain the particular term or provision held to be invalid. The failure of either party to enforce any provision of this contract shall not constitute a waiver by that party of that or any other provision of this contract.
7. **Public Contracting Statutes.** ORS 279B.220 through 279B.235 and 279C.500 through 279C.870, as applicable, are incorporated herein by reference.
8. **Independent Contractor.**
 - 8.1 Contractor shall perform the work required by this contract as an "Independent Contractor." Although County reserves the right to determine the delivery schedule for the work to be performed and to evaluate the quality of the completed performance, the County cannot and will not control the means or manner of the Contractor's performance. The Contractor shall comply promptly with any requests by County relating to the emphasis or relative emphasis to be placed on various aspects of the work or to such other matters pertaining to the work under this contract. Contractor is responsible for determining the appropriate means and manner of performing the work.
 - 8.2 Contractor represents and warrants that Contractor is not an employee of the County, is not currently employed by the Federal Government, meets the specific independent Contractor standards of ORS 670.600, and is not an "officer", "employee", or "agent" of the County, as those terms are used in ORS 30.260 et. seq.
 - 8.3 Contractor shall be responsible for all federal or state taxes applicable to any compensation or payments paid to Contractor under this contract. Contractor is not eligible for any federal Social Security, unemployment insurance, or workers' compensation benefits from compensation or payments paid to Contractor under this contract.

8.4 Contractor agrees to immediately provide County notice of any claim made against Contractor by any third party. Contractor also agrees not to assign to any third party, without County's written consent, any obligation of Contractor to indemnify County for any actions under this contract.

9 **Environmentally Preferred Products/Material Safety Data Sheets.** Whenever possible, the Contractor should use environmentally preferable products which present a lesser impact to the public health and the environment than competing products. Contractor agrees, upon execution of this contract, to submit a copy of the relevant material safety data sheet(s) for any chemical substance the Contractor will bring on to the County's premises and use as part of the work described in this contract.

10. **Nondiscrimination.** No person shall be denied or subjected to discrimination in receipt of the benefits of any services or activities made possible by or resulting from this contract on the grounds of race, color, religion, gender, sexual orientation, national origin, disability, age, or marital status. Any violation of this provision shall be considered a material defect and shall be grounds for cancellation, termination or suspension in whole or in part by the County.

11. **Termination.**

11.1 This contract may be terminated under the following conditions:

- a. By mutual consent of both parties.
- b. Contractor may terminate this contract upon a material default of County; however, Contractor must provide written notice to the County Contract Administrator and provide County with thirty days to cure the default.
- c. County may at any time terminate, the whole or any part of, this contract for default if Contractor fails to perform any of the provisions of this contract, or so fails to pursue the work as to endanger performance of this contract in accordance with its terms, and after receipt of written notice from the County, fails to correct such failures within seven calendar days or such other period as the County may authorize or require.
- d. County may terminate this contract immediately upon declaration of bankruptcy by Contractor or Contractor is taken into receivership.

11.2 Upon receiving a notice of termination issued by County, Contractor shall immediately cease all activities under this contract, unless expressly directed otherwise by County in the notice of termination.

11.3 In the event the Board of Commissioners of Washington County reduces, changes, eliminates, or otherwise modifies the funding for this contract, or if funding from federal, state, or other sources is not obtained and continued at levels sufficient to allow for the purchase of the indicated quantity of services, then County may terminate this contract, in whole or in part, effective upon delivery of written notice to the Contractor, or at such later date as may be established by the County, and Contractor agrees to abide by any such decision.

11.4 In addition to its other rights to terminate, either party may terminate this Agreement, in whole or in part, for convenience upon thirty days' prior notice to the other party. During this thirty-day period, each party shall wind down and cease its services as quickly and efficiently as possible, without performing unnecessary services or activities and by minimizing negative effects on the other party from such winding down and cessation of services.

11.5 The rights and remedies of each party provided in this section, are not exclusive and are in addition to any other rights and remedies provided by law or under this contract.

11.6 If this Agreement is terminated under subsections 11.3 or 11.4, County shall be liable only for payment in accordance with the terms of this contract for services satisfactorily rendered prior to the effective date of termination.

11.7 Upon termination, Contractor shall deliver to County all contract documents, information, works-in-progress, and other property that are or would be deliverables had the contract been completed.

12. **Time is of the essence.** Time is of the essence in Contractor's performance of each and every obligation and duty under this contract

13. **Force Majeure.** Neither County nor Contractor shall be held responsible for delay or default caused by fire, riot, acts of God, or war where such cause was beyond, respectively, County's or Contractor's reasonable control. Contractor shall make all reasonable efforts to remove or eliminate such a cause of delay or default and shall, upon the cessation of the cause, diligently pursue performance of its obligations under this contract.
14. **Compliance with Applicable Law.** Contractor and its subcontractor(s) shall comply with all federal, state, and local laws and ordinances applicable to the work performed under this contract including, but not limited to the following, as applicable: Title VI of the Civil Rights Act of 1964, Section V of the Rehabilitation Act of 1973, the Americans with Disabilities Act of 1990 (Pub L No. 101-336), ORS 659A.142 and all regulations and administrative rules established pursuant to those laws; and all other applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations.
15. **Contractor Certification Regarding Debarment, Suspension, Proposed Debarment and other Responsibility Matters.** The Contractor certifies to the best of its knowledge and belief that neither it nor any of its principals:
- 15.1 Are presently debarred, suspended, proposed for debarment, or declared ineligible from submitting bids or proposals by any federal, state or local entity, department or agency;
- 15.2 Have within a three-year period preceding this offer, been convicted or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performance of a public (Federal, state or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, tax evasion, or receiving stolen property;
- 15.3 Are presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 15.2 of this certification;
- 15.4 Have within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal, state or local public agency.
- 15.5 Are on the list titled "Specially Designated Nationals and Blocked Persons" maintained by the Office of Foreign Assets Control of the United States Department of the Treasury and currently found at: <https://www.treasury.gov/resource-center/sanctions/SDN-List/Pages/default.aspx>
- 15.6 Are out of compliance with the tax laws of Oregon and all tax laws of political subdivisions of the State of Oregon, including, but not limited to, ORS 305.620 and ORS chapters 316, 317 and 318. Washington County may terminate the contract if contractor fails to comply with any tax laws during the term of the contract.
16. **Oregon Registration.** If Contractor is not domiciled in or registered to do business in the State of Oregon, Contractor shall promptly provide to the Oregon Department of Revenue and the Secretary of State Corporation Division all information required by those agencies relative to this contract.
17. **Use of County Facilities.** Contractor and its employees or agents shall have the right to use only those facilities of County that are necessary to perform the services under this contract and shall have no right of access to any facility of the County without prior approval of County management. County shall have no responsibility for the loss, theft, mysterious disappearance of or damage to equipment, tools, materials, supplies, and other personal property of Contractor or its employees, subcontractors or agents which may be stored on County premises.
18. **Counterparts.** This contract may be executed in several counterparts, each of which shall be an original, all of which shall constitute one and the same instrument.
19. **Warranties.** Contractor represents and warrants to County that: (a) Contractor has the power and authority to enter into and perform the contract, (b) the contract, when executed and delivered, shall be a valid and binding obligation of Contractor enforceable in accordance with its terms, and (c) Contractor's performance under the contract shall be in a good and workmanlike manner and in accordance with the professional standards.
20. **Records.** Contractor shall maintain all fiscal records relating to this contract in accordance with generally accepted accounting principles. In addition, Contractor shall maintain any other records pertinent to this contract in such a manner as to clearly document Contractor's performance hereunder. Contractor acknowledges and agrees that County and its duly authorized representatives shall have access to such fiscal records and all other books, documents, papers, plans, and writings of the Contractor that are pertinent to this contract for the purpose of making audits, examinations, excerpts,

copies and transcriptions. In addition, Contractor shall permit authorized representatives of the County to perform site reviews for all Services Delivered by Contractor. All such fiscal records, books, documents, papers, plans, and writing shall be retained by Contractor and kept accessible for a minimum of three years, except as required longer by law, following final payment and termination of this contract, or until the conclusion of any audit, controversy, or litigation arising out of or related to this contract, whichever date is later. All subcontracts shall also comply with these provisions. If OMB Circular A-133 is applicable to this Agreement, then Contractor shall supply County with Contractor's DUNS Number.

21. **Work Product.** All work products of the Contractor which result from this contract ("the work products"), except material previously and mutually identified as confidential or proprietary, shall be provided to County upon request and shall be considered the exclusive property of the County. In addition, if any of the work products contain intellectual property of the Contractor that is or could be protected by federal copyright, patent, or trademark laws, or state trade secret laws, Contractor hereby grants County a perpetual, royalty-free, fully paid-up, nonexclusive and irrevocable license to copy, reproduce, perform, dispose of, use and re-use, in whole or in part, and to authorize others to do so. Such work products include, but are not limited to: databases, templates, file formats, scripts, links, procedures, materials, training manuals and other training materials, specially created key commands, and any other information, designs, plans, or works provided or delivered to the County or produced by Contractor under this contract.
22. **County Policies.** During the performance of this contract, Contractor shall follow County's Affirmative Action Program which is to promote the objectives of the Equal Opportunity Commission's guidelines as set forth in the Equal Opportunity Act of 1972, Oregon State Laws, legal mandates, and Presidential Executive Order 11246 entitled Equal Employment Opportunity as amended by Executive Order 11375 and as supplemented in Department of Labor Regulation 41 CFR part 60. Contractor shall also follow the County Workplace Discrimination, Harassment and Retaliation Prevention Policy, Workplace Violence Prevention Policy, Smoke Free Campus Policy and Personal Information Protection Policy. All subcontracts shall also comply with these provisions.
23. **Indemnification and Hold Harmless.** Contractor shall defend, indemnify and hold harmless the County, its agents, officers, elected officials and employees from and against all claims, demands and judgments (including attorney fees) made or recovered against them including, but not limited to, damages to real or tangible property or for bodily injury or death to any person, arising out of, or in connection with this contract, to the extent such damage, injury or death is caused or sustained in connection with the negligent performance or willful misconduct of Contractor, or its employee, agents or subcontractors. The County agrees to promptly notify Contractor in writing of any such claim or demand to indemnify and agrees to cooperate with Contractor in a reasonable manner to facilitate the defense of such claim.
24. **Insurance.** Contractor shall provide insurance coverage and limits as described below. All insurance carried by Contractor must be primary to and non-contributory with any insurance, including any self-insurance or retentions carried by the County. A waiver of subrogation in favor of the County shall be required on General Liability, Workers Compensation and Automobile Liability coverage.
 - 24.1 **Workers Compensation Insurance.** Contractor shall comply with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers. No Workers' Compensation Insurance has been or will be obtained by the County for Contractor or Contractor's employees and subcontractors. Contractor shall provide and maintain workers' compensation coverage for its employees, officers, agents or partners as required by applicable workers' compensation laws including employers' liability with limits not less than \$500,000/ \$500,000/ \$500,000.
 - 24.2 **Commercial General Liability Insurance.** Contractor shall at all times carry a Commercial General Liability insurance policy for at least \$1,000,000 combined single limit per occurrence and at least \$2,000,000 in the aggregate per project, for Bodily Injury, Property Damage, and Personal Injury. This insurance shall include contractual liability coverage for the indemnity provided under this contract.
 - 24.3 **Automobile Liability Insurance.** Contractor shall at all times carry Automobile Liability Insurance in the amount of \$1,000,000 combined single limit per accident for Bodily Injury and Property Damage for Contractor's vehicles, whether owned, hired, or non-owned, which includes coverage for Washington County, its agents, officers, elected officials and employees.
 - 24.4 **Professional Liability/Errors and Omissions Insurance.** Contractor shall at all times carry a Professional Liability/Errors and Omissions type insurance policy with limits of not less than \$1,000,000 each occurrence (or each claim if coverage is afforded on a claims made basis) and \$2,000,000 in the annual aggregate. If this policy is a "claims made" type policy, the policy type and company shall be approved by Washington County prior to commencement of the Work.

- 24.5 **Extended Reporting Coverage (“Tail Coverage”).** For Professional Liability/Errors & Omissions Insurance written on a “claims made” basis and for any other required liability insurance provided on a “claims made” basis, Contractor shall provide “tail” coverage at the completion of the contract for a duration of thirty-six (36) months or continuous “claims made” liability coverage provided for thirty-six (36) months following contract completion. Continuous “claims made” coverage will be acceptable in lieu of “tail” coverage provided the retroactive date of the coverage is on or before the effective date of this contract.
- 24.6 **Maximum Deductible/Retention.** Any deductible or retention must be disclosed on the certificate of insurance and no deductible or retention may exceed \$25,000 without the prior written consent of the County. Contractor is responsible to pay any amounts within the deductible or retention amount.
- 24.7 **Additional Insureds.** The County, its agents, officers, elected officials and employees must be named as additional insureds with respect to Contractor’s services to be provided under this Contract. All liability insurance policies, with the exception of professional and/or workers compensation policies, must be endorsed to show this additional coverage.
- 24.8 **Insurance Certificates.** Contractor shall deliver to the County, prior to the commencement of the work, a certificate of insurance evidencing all policies required by this contract including additional insured provisions afforded by the policy. This requirement can be satisfied by providing a copy of the coverage form and/or the endorsement(s). Further, it is an affirmative obligation upon the Contractor to advise the Contract Administrator within two business days of any substantive change of any insurance policy or endorsement set out herein, and failure to do so shall be construed to be a breach of this contract.
- 24.9 **Subcontractor Insurance.** Contractor shall require and verify that all of its subcontractors of any tier provide insurance coverage and limits identical to the insurance required of the Contractor under this contract, unless this requirement is expressly modified or waived by the County.
- 25. **Survival.** The terms, conditions, representations, and all warranties contained in this contract shall survive the termination or expiration of this contract.
- 26. **Amendment.** This contract may only be amended by a written amendment signed by authorized agents of both parties.
- 27. **Protecting the Federal Government’s Interest When Subcontracting with Contractors Debarred, Suspended, or Proposed for Debarment.** The Federal Government suspends or debars Contractors to protect the Federal Government’s interests. The Contractor shall not enter into any subcontract in excess of \$25,000 with a Contractor that is debarred, suspended, or proposed for debarment unless there is a compelling reason to do so. The Contractor shall require each proposed first-tier subcontractor, whose subcontract will exceed \$25,000 to disclose to the Contractor, in writing, whether as of the time of award of the subcontract, the subcontractor, or its principals, is or is not debarred, suspended, or proposed for debarment by the Federal Government. A corporate officer or a designee of the Contractor shall notify the Contract Administrator, in writing, before entering into a subcontract with a party that is debarred, suspended or proposed for debarment.
- 28. **Security of Information**
 - 28.1 The County is required to notify its customers if any electronically stored information or written document that contains personal information has been subject to a security breach. Any Contractor of the County who becomes aware of any potential breach of a document or electronic file containing personal information of client of the County will immediately notify the Contract Administrator, who will work with the County Public Information Officer to notify the affected persons. A breach occurs when any unauthorized individual or entity gains access to personal information or when unintended disclosure of personal information is made, for example loss or theft of a electronic device containing personal information, loss or theft of a paper document containing personal information, unauthorized access to a network containing personal information, or a document containing personal information being sent to the wrong address.
 - 28.2 No County Contractor will print a person’s full Social Security Number (SSN) on any document that will be sent through the mail, without a written request from the person whose SSN will be printed on the document, except as required by law. The Contractor will use only the last 4 digits of a SSN on all documents unless there is a compelling business reason to use the entire SSN. If a document contains a full SSN, the Contractor will take steps to protect the document from unauthorized disclosure. Contractors will not provide copies of a document containing a full SSN to anyone other than the person whose SSN is listed on the document, except as allowed by State or Federal law. The Contractor may provide a copy of a document to a third party with the SSN redacted if the document is otherwise allowed to be released. No Contractor will publicly post or display a document containing a full SSN.

28.3 Any County Contractor that collects personal information must develop, implement and maintain reasonable safeguards to protect the security and confidentiality of the information. Employees of the Contractor with access to personal information must take reasonable steps to prevent a breach of the information. Reasonable steps include locking file cabinets, monitoring who has access to areas containing personal information, locking computer workstations if leaving the area, and maintaining physical control over files, computer workstations, thumb drives, cds or other media which contains personal information. Contractors must also ensure the proper disposal of documents or other media which contains personal information. Contracting with a document shredding company will be considered proper disposal of paper documents. The Contractor will be responsible for properly disposing of or erasing electronically stored personal information on hard drives, CDs, thumb drives or other devices under their control.

29. Performance Standards. Unless the Contractor is providing architectural, engineering, photogrammetric mapping, transportation planning or land surveying services or related services, as defined in ORS 279C.100, the Contractor must meet the established industry or business performance standards most closely involved in providing the goods or services.

30. Remedies. The consequences of the Contractor's failure to perform the scope of work or to meet the performance standards established by this contract may include, but are not limited to:

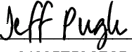
- a. Reducing or withholding payment;
- b. Requiring the Contractor to perform, at the Contractor's expense, additional work necessary to perform the identified scope of work or meet the established performance standards; and
- c. Declaring a default, terminating the contract and seeking damages and other relief available under the terms of the contract or other applicable law.

31. Whole Contract. THIS CONTRACT CONSTITUTES THE COMPLETE AND EXCLUSIVE STATEMENT OF THE CONTRACT BETWEEN THE PARTIES RELEVANT TO THE PURPOSE DESCRIBED HEREIN AND SUPERSEDES ALL PRIOR AGREEMENTS OR PROPOSALS, ORAL OR WRITTEN, AND ALL OTHER COMMUNICATION BETWEEN THE PARTIES RELATING TO THE SUBJECT MATTER OF THIS CONTRACT.

SECTION 6 – SIGNATURES

FOR CONTRACTOR:

By my signature below, I certify that I am authorized to execute this contract on behalf of Contractor.

| | |
|--|--------------------------|
| DocuSigned by:  64335E59C7CD4C5... Authorized Signature | 1/27/2020 |
| _____ | _____ |
| Jeff Pugh | Executive Vice-President |
| _____ | _____ |
| Printed Signatory Name | Title |

Business Name or DBA(Check Payable to): Executive Information Services, Inc.

Address: 1396 NE 20th Ave., Building 100,

City, State, Zip: Ocala, Florida 34470

Email: _____


CCB Number and/or DUNS Number (if applicable): 617616110

Contractor Contact Person:

Contractor Contact Person: Adam Missler Phone: (856) 701-6107

Contractor Contact Email: adam@goeis.net

FOR COUNTY:

| | |
|--|-----------|
| DocuSigned by:  7CE70623E43542D... Authorized Signature | 1/27/2020 |
| _____ | _____ |
| Deputy County Administrator | |
| _____ | |
| Printed Signatory Title | |

DocuSigned by:

0A02924E480543C...
Gregg Merlihan

Senior Executive Vice President

1/27/2020



ATTACHMENT A

WASHINGTON COUNTY JMS STATEMENT OF WORK

Version 3 - 12/9/2019

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STATEMENT OF WORK

Washington County Sheriff's Oregon

Purpose

The purpose of this document is to define the software and services being provided by EIS Corporation (EIS) to the Washington County Sheriff's Office (WC), OR as part of the Jail Management System (JMS) project. The activities associated with the implementation of each of the Jail systems has been identified through a set of tasks itemized within this Statement of Work (SOW). In some cases, a single task will combine the required activity to satisfy both systems.

The following Statement of Work (SOW) defines the principal activities and responsibilities of all parties for the implementation of an integrated Jail Management System to support Washington County (hereinafter called the "WC") jail/corrections management operations. The system will be composed of the following primary software components, with the installed software being the latest software release that is available at the time of installation. Unless otherwise indicated from the context in which it is used, the word "system" will be used herein to refer to the compilation of the foregoing subsystems, interfaces and ancillary systems.

Deliverables Overview

The Project Task Section of this document lists and defined the project deliverables that EIS will provide.

- **Project Organization.**

EIS will designate a senior experienced manager that will be assigned for the duration of the project. This person provides a direct point of contact for the Agency. Coordinate and conduct the Project Kickoff Meeting. Develop and maintain the joint Project Plan including the Responsibility Matrix. Provide frequent Status Reports as agreed upon by both parties.

- An EIS Project Manager will be assigned to this project. EIS will designate a senior project manager for the duration of the project as the direct point of contact for the WC.

- **Customer Organization Meeting**

- EIS and WC project teams meet to further define the project, review the deliverables, WC hardware requirements, and establish an implementation schedule and procedures.

- **Project Specification and Implementation Plan**

The EIS Project Manager shall manage EIS activities through the EIS Project Plan. The EIS Project Plan shall describe tasks, estimated duration, task dependencies and estimated completion dates for tasks defined within the Statement of Work. The EIS Project Plan shall describe the elements and define associated deliverables and resources.

The EIS Project Manager shall coordinate with the Agency assigned Project Manager by regularly providing an up-to-date EIS Project Plan to maintain and manage the master project schedule including the development of schedules, determination and assignment of tasks, and schedule adjustments and may be made available for online viewing.

The initial EIS Project Plan shall be developed in conjunction with the Agency Project Manager upon project commencement and shall be submitted for acceptance. The activities that are scheduled to begin between submission of the initial EIS Project Plan and acceptance thereof shall not be delayed before acceptance of the initial EIS Project Plan.



- WC and EIS develop and accept a functional Project Plan. The Project Plan will include a project synopsis, project organization and staffing, overview of deliverables, implementation schedule, training plan, data conversion plan, and cut-over and live operation plans.
- The Project Plan is jointly developed by the EIS Project Manager and WC Project Manager, and mutually approved.
- It is estimated that the full implementation will require approximately **Twelve (12)** months from date of order. Due to the scope, the implementation may be phased to accommodate individual WC schedules and EIS resources.
- **System Preparation**
 - EIS Staff will configure the EIS system on the County provided windows operating system and hardware to the agreed deliverables and complete any required custom programming and configuration tasks as specified in the project plan.
 - EIS deploys contracted interfaces in accordance with the interface specifications.
 - EIS to Complete an initial test data conversion. WC will validate conversion.
- **Installation and Configuration**
 - Installation and Configuration phase is done on the WC system and consists of a concentrated functional review workshop, followed by review sessions as specified in the project plan.
 - EIS will install the system and required interfaces on the customer site.
 - EIS will train the designated WC system administrators in the JMS system, theory and use.
 - EIS and WC staff will configure the initial data tables, workflow, and processes in coordination with agency subject matter experts.
 - EIS will perform Data Conversion and will verify data completeness and accuracy in accordance with the agreed upon data migration plan.
 - EIS will provide system documentation, including user manuals, application notes, and machine-readable manuals with rights to reproduce within the agencies.
- **Customer Validation and Testing**
 - WC will perform a validation of data conversion for business use.
 - WC will perform Functional Acceptance Testing for an agreed upon period to ensure the JMS system and supporting components installed are operational at WC, providing an environment for WC to define internal operation policies and validate the system for operational use.
 - WC will develop any in-house required procedures or policies for operation of the new system.
 - EIS will Complete Configuration Acceptance test with WC and schedule live operation transition.
- **Live Operation**
 - EIS arrives on site to resolve outstanding issues and complete any required updates.
 - WC JMS users are trained on the use of the system and training documents are provided.
 - EIS to complete final data conversion, WC to validate final data conversion.
 - EIS and WC users complete the acceptance testing and WC sponsor must provide signoffs. The system converts to live operation.
 - EIS provides on-site start-up support and go-live assistance.



- **Hardware**
 - WC to provide selected Hardware Equipment as specified in the pricing proposal.
- **System Software**
 - Jail Management software suite and supporting applications, interfaces and customizations as listed in this document and in accordance with the detailed responses provided by EIS in association with the items detailed in the SOW.
 - M2 message switch and interface to the State of Oregon ORLEDS system. This interface will provide a defined set of integrated inquiry and entry capabilities for the other subsystems.
 - PocketJMS software to be installed on WC provided wireless hardware.
 - JMS Pre-Booking software.
 - Text to Data EngineDL Credential Mapping Templates
 - Media Streaming Service
 - BioMetric Engine/Fingerprint Verification Engine
 - Programs module
- **Data Conversion**
 - WC Tiburon– Jail data migration
 - WC Tiburon Mugshots– Image File Migration
 - WC PSWEB Application – Local SQL Database (County Developed)
 - WC Jail Systems– Local Jail Database (County Developed)
 - WC Rehab– Local Jail Database (County Developed)
- **Interfaces**
 - Interfaces to Third Party Systems as Itemized within the interface task elements presented in this SOW.
- **Training Services**
 - Training as agreed in the Implementation Plan, within the training hours purchased by the WC;
 - Administrator
 - End User
- **System Documentation**
 - Specified System documentation. EIS will provide system documentation in electronic format only.
 - JMS Users Guide
 - JMS Training Guide
 - JMS Supporting specialty manuals (as developed)

Additional Project Information



Substitute Products

EIS, Inc. reserves the right, as part of the requirements stated herein, to provide products and services of equal or better quality, of comparable value and certified for operation with EIS systems that are available at the time of installation or delivery. These substitutions will be at no additional cost to the WC, unless the scope of the project is modified by change order. Deviations and changes to this SOW are subject to mutual agreement between EIS and the WC. Any substitutions proposed by EIS must be accepted, in writing, by Washington County.

Training Information

The WC must provide a training location with a minimum of 20 workstations for training that meet the minimum hardware requirements for JMS. The training location must be free of distractions and scheduling of staff must be uninterrupted for the duration of the training. WC will ensure that a subject matter expert level staff member is present during each training who can address agency policy and procedure questions that arise during the training and are not addressed in the use policy document.

The training schedule will be drawn up as part of the Implementation Plan with assistance from the WC Project Manager.

Training assignments will be the responsibility of the WC with input from EIS staff on who should be trained on which modules. The WC will be responsible to coordinate WC personnel to attend scheduled training sessions. Training to include:

1. JMS Administrator Training.
2. Direct End-User training for designated users of the system within the WC.
3. Train the Trainer Training for agency designated JMS Trainers.
4. System documentation, including user manuals, application notes with rights to reproduce within the agencies.

System Interfaces

Each system interface will be developed and deployed in accordance with the EIS interface specifications accepted by the WC. Once accepted, the development interface specification will be the presiding document and be incorporated into the contract forthwith. All interfaces are subject to dependencies and are partially reliant on factors beyond the control of EIS. As such, the deliverable items related to all interfaces are directly dependent on the availability of external resources (connections to foreign systems, data, and other external components). System interfacing will be dependent on the system software up and fully running before a successful interface can be completed by EIS. Delays related to the required dependencies are not the responsibility of EIS.

All interfaces with other products will be completed as quickly as possible, however without the cooperation of the third-party software vendors, implementation could be delayed. This would not be the responsibility of EIS and outside the scope of the SOW. WC agrees that the installation of the various interfaces on WC hardware that meet the agreed upon specification satisfies the interface requirement regardless of third-party issues and delays.

Change Control Procedures

Change Requests can be initiated by either party. Using the Change Control Form, the Receiving Party will review any change requests, conduct an impact analysis, propose alternative approaches, if any, and advise the Initiating Party of the findings with all associated additional fees and schedule impacts within a reasonable timeframe of the Receiving Party's receipt of any such Change Control Form. Changes shall be made as amendments to the Statement of Work and shall set out the nature of the change, the new fee and schedule, and any other agreed upon services. Amendments shall only be effective when signed by the WC and EIS.

The change control form will be developed by EIS for use as required. Once received and reviewed, the receiver will make a determination as to how to proceed with the request



- a. If the change can be implemented with no substantial change to the scope of the project, the change can be approved at no charge and forwarded to the Project Manager for implementation.
- b. If the change is outside the original design and scope of the project, the change can be approved with an additional charge (if approved) and forwarded to the Project Manager for implementation.
- c. Save the change as a future release request (specified date or unspecified date, these requests are not binding and EIS is not committing to provide such a feature.).
- d. Disapprove the change as there is no implementation path supported by the software.

Either EIS or WC may request changes to this Statement of Work at any time. Because such changes could significantly affect the cost, schedule, or other critical aspects of the work being performed, both WC and EIS must approve each change request in writing prior to implementation. The following change control procedure will be used except as superseded by mutual agreement or other binding procedures:

1. A "Change Request" (CR) prepared in a form and format acceptable to both WC and EIS will be the vehicle for communicating change.
2. A "Change Request" must describe the requested change, the rationale for the change, and any anticipated effect the change will have on the contract and/or the work performed under the contract.
4. WC and/or EIS should complete all reviews and officially approve or reject an issued "Change Request" within ten (10) business days of receipt.
5. Resolution of open issues concerning the definition, submission, acceptance, rejection, or implementation of all "Change Request" 's will occur via resolution process mutually selected by and agreeable to WC and EIS.

Custom/Project Software Development

The project does include software development services specifically related to deliverable components referenced within this Statement of Work. All development work is performed to modify or enhance existing functions provided within the EIS application software. All software modifications, enhancements or reports developed as part of this project are incorporated into the commercial JMS product licensed from EIS and is fully owned by EIS. No software modifications, enhancements or reports developed as part of this project shall be construed as a "Work for Hire".

Other Issues

The WC is responsible to provide all hardware and software that conforms to the minimum requirements as outlined by EIS (See EIS publication on minimum hardware software standards).

Exclusions

EIS implementation is limited to software and services only (and any specifically denoted hardware). Any hardware, communications circuits, system software, or other third-party components not explicitly itemized herein or on related purchase documents are excluded.



Project Organization and Management Tasks

Task PO 1: Project Management

Objective: EIS and WC assign project managers for the duration of this project.

Task Description:

Both WC and EIS will designate a project manager who will direct the efforts and serve as primary point of contact for the project.

Responsibilities:

EIS will designate a Project Manager who will direct EIS's efforts and serve as the primary point of contact for the WC. The responsibilities of the EIS Project Manager include:

- a) Maintain project communications with the WC's Project Manager.
- b) Manage the efforts of EIS staff and coordinate EIS activities with the WC's project team members.
- c) Resolve deviations from the Project Schedule.
- d) Monitor the project to ensure that support resources are available as scheduled and as identified in the project plan.
- e) Coordinate and oversee the installation of all licensed EIS/EIS application software.
- f) Review and administer change control procedures through the WC's Project Manager, commonly referenced as a "Change Request" (CR), issued by the EIS Project Manager.
- g) Conduct status meetings via telephone or email with the WC's Project Manager, as reasonably required, to discuss project status and prepare status reports as agreed upon.
- h) Provide timely responses to issues related to project progress raised by the WC's Project Manager.
- i) Working with the WC Project Manager, develop and maintain a Project Task List to identify project tasks and deadlines.

WC will designate a Project Manager who will direct WC's efforts and serve as the primary point of contact for the WC. The responsibilities of the WC Project Manager include:

- a) Maintain project communications with EIS's Project Manager.
- b) Identify the efforts required of WC staff to meet the WC's task requirements and milestones in the Statement of Work and Project Schedule.
- c) Review the preliminary Project Schedule with EIS's Project Manager and assist EIS in developing a detailed Project Schedule defining the detailed tasks and a schedule of EIS and WC responsibilities.
- d) Measure and evaluate progress against the Project Schedule.
- e) Monitor the project to ensure that WC support resources are available as scheduled.
- f) Attend status meetings with EIS's Project Manager.
- g) Provide timely responses to issues related to project progress raised by EIS's Project Manager.
- h) Liaison and coordinate with other WC agencies, other governmental agencies and the WC's contractors.



- i) Review and administer change control procedures, hardware and software certification, and all related project tasks required to maintain the implementation schedule.
- j) Approve payments in a timely manner.
- k) Ensure that all appropriate WC personnel attend and actively participate in all project activities.
- l) Assign one or more personnel who will work with EIS staff as needed for the duration of the project, including at least one system administrator, one database administrator and a command staff representative from the Sheriff's department that can make policy decisions.
- m) Work with EIS personnel in designing and approving a project task list as mentioned in the EIS Project Manager Responsibilities.
- n) Provide building access to EIS personnel to all facilities where the system is to be installed during the project. Identification cards should be issued to EIS personnel if required for access to WC facilities. **Access must be available 24 hours a day during the course of this project with required escorts when necessary.** EIS acknowledges that access to County facilities will be governed by the County's security and access requirements and will cooperate with the County to ensure EIS staff and any subcontractor personal adhere to County access standards.
- o) Provide adequate workspace for EIS personnel to include desks, chairs, worktables, telephone with long distance access, color printer access, and DSL or faster internet connections access is limited to county policy, vendors must adhere.
- p) As applicable to EIS's installation, assume responsibility for all fees for licenses and inspections and for any delays associated with inspections due to the required permits.
- q) Provide reasonable care to prevent equipment exposure to contaminants that cause damage to the equipment or interruption of service. Ensure a safe work environment for EIS personnel. If problems are encountered with hazardous materials, EIS will immediately halt work and the WC will be responsible for the abatement of the problem or EIS and the WC will jointly come to a mutual agreement on an alternative solution. EIS will be excused from timely performance of its obligations pending such resolution.
- r) Provide CJIS certified staff and their EIS owned computers network access to the relevant servers for purposes of installation, configuration and maintenance.

Dependencies:

Assignment of Project Managers.

Completion Criteria:

This task is considered complete when WC and EIS assign their designated Project Managers.

Task PO 2: Project Organization Meeting

Objective: Hold Project Organization meeting with designated EIS and WC staff.

Task Description: Project Planning and Organization tasks include the establishment of the EIS and WC project managers, project team and the provision of a Project Kickoff/Organization Meeting. This activity also identifies and communicates specific project tasks to be undertaken by EIS and WC. Timeframes will be established for the development of related project management deliverables under this Statement of Work, including the Project Plan.

The initial project organization meeting is a facilitated work session designed to establish project organization and reporting and to set initial parameters on the overall project implementation. A key objective of this meeting is to



provide implementation assistance to WC personnel and answer outstanding questions and concerns related to the project.

The objectives of this task are:

- To introduce all project participants and review roles of key participants;
- Review contractual requirements and overall scope of the project;
- Answer key customer questions and address concerns related to the project;
- Establish a clear chain of communication, authority and reporting procedure;
- Review resource and scheduling requirements;
- Review and collect interface data;
- Review the implementation procedures and establish a general timeline for the project to include any known administrative delays that may affect project implementation;
- Finalize Hardware Requirements to support the JMS system and peripheral applications;
- Site Tour;
- Acquire information sufficient to begin the development of the following project plans;
 - Implementation Plan
 - Responsibility Matrix
 - Training Plan
 - Acceptance Test Plan
 - Interface Plan
 - Conversion Plan

Dependencies:

Executed and accepted contract.

Completion Criteria:

This task is considered complete when the on-site Project Kickoff Session has been held with EIS and WC representatives in attendance.



Task PO 3: Hardware Requirements and Site Preparation

Objective: Validate and finalize the WC's hardware and third-party software requirements.

Task Description:

EIS will verify that WC has met all the hardware requirements, operating system requirements, network, access points and third-party software for the JMS system. Task will be performed at the project organization meeting.

Responsibilities:

EIS will:

- a) Verify with WC personnel the recommended computer processor(s), operating system software, third-party software, all associated workstations, printers, communications and related components.
- b) Verify with WC the network topology and configuration requirements.
- c) Prepare a final hardware and operating system software deliverables list (if required), thus amending Project Deliverables, as appropriate.
- d) Pre-plan installation activities with WC.
- e) Verify with WC the server installation and support processes utilized by the WC.
- f) Verify the provision of remote access to WC servers by EIS installation and Support staff.

WC will:

- a) Provide, upon request, information on existing hardware and operating system software components and terminal networks, as well as projected utilization statistics and other information as is reasonably required to validate final hardware requirements.
- b) Review the final hardware and operating system software configuration with the EIS project team.
- c) Order hardware as determined and notify EIS as to delivery and installation schedules.
- d) Certify the WC provided hardware is installed and ready for use as determined in the project organizational meeting.

Dependencies:

WC IT resources, including:

- Network/Network Security
- DBA
- Desktop Support
- Server Support

Completion Criteria:

This task is considered complete when the final hardware and operating system software configuration is complete and approved by the WC and EIS.

Task PO 4: Develop Project Schedule Document

Objective: Establish and deliver the Project Schedule as a working document.



Task Description:

The objective of this task is to finalize the preliminary Project Schedule. The Project Schedule will be finalized and mutually agreed upon between the parties.

EIS will:

- a) Review with WC personnel the identified implementation tasks, priorities, inter-dependencies and other requirements needed to establish the Project Schedule.
- b) Prepare the Project Schedule document and deliver the first version of the implementation and training plan to the WC.
- c) Review the Project Schedule with WC personnel and make changes and/or corrections that are mutually agreed upon.
- d) Assume accountability for all EIS supplied tasks within the Project Schedule.

WC will:

- a) Analyze with EIS project personnel the identified requirements and make such implementation decisions as are reasonably required to finalize the Project Schedule.
- b) Work with EIS staff to finalize the Project Schedule.
- c) Notify EIS of any known or anticipated events that may impact the schedule and work with EIS to revise the implementation plan to accommodate these events.

Dependencies:

Completion of the project organization meeting and review of agency implementation requirements.

Completion Criteria:

This task is considered complete upon completion of the preliminary project schedule as mutually agreed between EIS and WC.

Task PO 5: Project Definition and JMS Functional Review Workshop

Objective: Review EIS JMS Functional Design and define WC Operational Requirements.

Task Description: EIS project staff will meet with WC assigned project team members and stakeholders to provide a project overview to discuss project expectations, and to review intended outcomes as related to the Jail Management System (JMS). The purpose of this task is to review the functional capabilities of the system software and contracted services to ensure that customer WC personnel understand the conceptual details of the systems and have a grasp of the systems operational parameters. EIS will discuss the intended use of each provided operational module with WC personnel, define extended system parameters and other information that will be required to allow EIS to configure the system for installation at the customer site. Review the WC operational procedures and identify any WC-specific requirements to meet general system level State Reporting requirements and other identified system operational requirements. Review data conversion approach.

This workshop provides an overview of the various JMS code tables and the requirements for gathering the data to build these files. Provide worksheets and review data import options to populate standardized tables. The session provides an overview of options available to WC for performing agency specific system tailoring and determining operational system parameters.

Responsibilities:

EIS will:



- a) Review the operational and business requirements of the WC.
- b) Conduct a review with WC of EIS JMS functionality based on current EIS JMS Design Specifications.
- c) Obtain, with WC's assistance, state standards and requirements applicable State level Reporting.
- d) Summarize outstanding items and provide a definitive project schedule in an *Internal Reference Specification (IRS)*. Copies of this will be provided for the Agency and reviewed with Agency management to help ensure that the project is on track and that both parties have a firm understanding of the overall software configuration objectives.

WC will:

- a) Assign appropriate WC personnel to attend the functional review session.
- b) WC's JMS database administrator will attend the functional review session.
- c) Aid EIS in obtaining the state standards and requirements.
- d) Provide acceptance of EIS JMS Design specifications and general system reporting specifications.
- e) Participate in the review of the EIS JMS functionality, based on the current or proposed EIS Design Specifications.
- f) Collect and provide all system table and validation data values, unless specified otherwise by mutual agreement.

Dependencies:

- 1. Deployed EIS JMS Server software to WC production machines.
- 2. Deployed JMS workstation software to workstations to be used during the review session.

Completion Criteria:

This task is considered complete when EIS has provided the on-site JMS Review Workshop session and provided WC with a documented review of EIS JMS functionality, state reporting requirements, and identified enhancements discovered as part of the workshop as a project software configuration document.



Project Plan

Task PP 1: Project Plan

Objective: EIS Project Manager will develop a Project Plan and deliver to the WC for approval. The

Task Description:

The EIS Project Plan shall describe tasks, estimated duration, task dependencies and estimated completion dates for tasks defined within the Statement of Work. The EIS Project Plan shall describe the elements and define associated deliverables and resources. Adjustments to the project plan will be on-going. The EIS Project Manager will write and submit a detailed Project Plan to the WC for approval. The Project Plan will include the following:

- A project synopsis with key objectives and goals of the new systems.
- A reiteration of the project organization and staffing.
- An abbreviated list of contract deliverables as outlined in this SOW.
- An initial implementation schedule showing key milestones and installation sequences.
- A training plan that will lay out the training requirements in hours, schedule, training facilities, and responsibilities. The actual scheduling of personnel will be done at a date closer to the Training and Live Operations phase.
- A data conversion plan.
- A cut-over plan for go-live operations.

Responsibilities:

EIS Will:

- a. The EIS Project Manager will write the Project Plan and deliver to the WC Project Manager for review and approval.

WC Will:

- a. The WC Project Manager will review and approve the Project Plan.

Dependencies:

Completion Criteria:

This task is complete upon acceptance of the initial project plan by WC project manager.

Task PP 2: Acceptance Test Plan(s)

Objective: EIS Project Manager will work with the WC project team to develop an “Acceptance Test Plan” and deliver to the WC for approval. The successful completion of the Acceptance test plan will constitute “Final” system acceptance.

Task Description:

The EIS Project Manager assist the WC in the development of the system acceptance criteria and the “Acceptance Test Plan” that will detail the procedures to be utilized for the acceptance tests, test plans will include:



- a) Installation Acceptance Test Plan – Certification of the initial baseline software deployment.
- b) Functional Test Plan – Certification that the system is configured according to deployment specifications, including WC specific configurations and customizations.
- c) Data Conversion Acceptance Test Plan – Certification that the data conversion has been completed in accordance with the data conversion plan.

Responsibilities:

EIS Will:

- a. The EIS Project Manager will assist the WC Project Manager in the development of the referenced plans for review and approval.
- b. Coordinate all EIS resources as required in the development of the related plans.

WC Will:

- a. The WC Project Manager will review and approve the Acceptance Test Plan.

Dependencies:

Completion Criteria:

This task is considered complete upon mutual acceptance of the written Test Plan by EIS and WC project manager(s).



Hardware & Platform Delivery Tasks

Task HW 1: Review WC Production Server Hardware

Objective: Review and accept the production WC provided server configuration as ready to receive application software.

Task Description:

Objective involves reviewing the server environment provided to ensure appropriate integration with WC network, installation and configuration of appropriate system software, including: Server OS's, Service packs, SQL database software, MSMQ, .NET frameworks, IIS and other components as specified by EIS installation group.

Access for EIS must be granted by WC to attach to provided servers with administrative privileges using EIS owned computers by EIS CJIS certified staff. EIS technical staff will verify the configured components deployed on servers. Specific tests will be performed to assess component configuration. If components are missing or improperly configured, EIS installation group will notify WC of the deficiency and coordinate with the WC a resolution plan. Due to the nature of the proposed VM deployment module, EIS is unable to address issues related to systems and configuration below the VM Client OS level.

Responsibilities:

EIS will:

- a) Provide consulting assistance and server requirements for the proposed JMS system. Review server configurations install applications and services and test configuration.
- b) Verify and accept server configuration as "Ready for Use".

WC will:

- a) Install and configure the servers into a production environment.
- b) Install and configure all Server hardware, OS's, OS Service packs, .NET Frameworks, SQL database software and other components as specified by EIS installation group.
- c) Provide administrative access to EIS installation Group.
- d) Be available to address and answer questions, modify configurations, and modify security permissions if required during the installation.

Dependencies:

- 1. WC provided server hardware must be installed and configured for use within the WC's network environment.
- 2. All WC provided server-side software is loaded and configured for use.
- 3. EIS technical/installation group must be granted access to the servers at an administrative level.

Completion Criteria:

This task is complete when EIS certifies as "Ready to Use" the production server systems provided by the WC.



Task HW 2: Install the County-provided Microsoft SQL Server Database Instance

Objective: The objective of this task is to install the supporting Microsoft SQL Server Database software instance on the production server(s) and certify the Microsoft SQL Server DB configuration as ready to use.

Task Description:

County IT to install the County-provided Microsoft SQL Server Database software to on County provided database server hardware. The SQL Server database software will be installed on production and test servers by County IT utilizing Mixed-Mode access, and full permission rights will be granted to EIS installation personnel. EIS installation staff will configure the supporting Microsoft SQL Server Database software with the system data tables and permission set required to support the delivered PS.NET application software (and specified County configurations), on the designated County-provided server.

Responsibilities:

EIS will:

- a) Install the baseline JMS and other licensed modules database schemas within this configuration.
- b) Test the initial operation of the baseline database subsystem and provide a status report to the WC's project manager upon completion.
- c) Provide written certification of successful installation.

WC will:

- a. Install and configure designated database server hardware on County's network (Hardware).
- b. Provide access to WC-provided hardware components to EIS installers. WC provided hardware and/or software must meet EIS recommended specifications and configuration.
- c. Be available to address an answer questions, modify configurations, and modify security and provisioning if required during the installation.
- d. Develop a standard backup routine of the SQL database with EIS staff. Test and implement.

Completion Criteria:

This task will be completed upon the installation and configuration of the Microsoft SQL Server Database software on the database server and certified by EIS as ready to use as indicated in the implementation plan and accepted by WC.

NOTES:

All required network protocol connectivity, firewalls and web services required to attach the workstations and other system servers to the SQL Server database must be provided by the County and must be operational prior to onsite installation by EIS technicians.



Task HW 3: Review JMS Training and Test Server Hardware

Objective: Review and accept the training/test level, WC provided server configuration as ready to receive application software. As part of the project EIS will install an isolated test/training instance of the system software on county provided servers.

Task Description:

Objective involves reviewing the training/testing server environment provided to ensure appropriate integration with WC network, installation and configuration of appropriate system software, including: Server OS's, Service packs, SQL database software, MSMQ, .NET frameworks, IIS and other components as specified by EIS installation group.

Access for EIS must be granted and systems verified in the same manner as Task HW1.

Responsibilities: Same as Task HW1

Dependencies: Same as Task HW1

Completion Criteria:

This task is considered complete when EIS certifies as "Ready to Use" the test/training server systems provided by the WC.

Task HW 4: EIS provided JMS Hardware and peripheral equipment.

Objective: Order, receive, install and test any hardware components as ordered and listed in contract to be provided by EIS associated with the project.

Task Description:

Objective involves the loading and configuration of any WC purchased required third-party software to support deployment of EIS delivered Hardware. Any JMS or RMS hardware and software components included as a contract deliverable will be ordered, delivered and installed at this time per the project plan.

Responsibilities:

EIS will:

- a) Ensure delivery to the WC EIS supplied equipment as appropriate.

WC will:

- a) Formally acknowledge receipt of EIS provided hardware, subject to 5 business day inspection.
- b) Provide appropriate electrical, network connections and supporting components as required within the environment to which the hardware will be deployed.
- c) Install and deploy EIS provided components as required and certify as available and ready for use within the system, in accordance with the project timeline.
- d) Install and deploy any required third-party software to support EIS provided hardware.
- e) Be available to address an answer questions, modify configurations, and modify and permissions if required during the installation.

Dependencies:

1. Receipt of formal order in the form of a PO, project Change Order or contract for the purchase of EIS provided hardware.



Completion Criteria:

This task is considered complete when the EIS provided hardware components as indicated in the contract have been delivered to the WC as defined in the acceptance plan.



Software Deliverable Tasks

Task SFTW 1: Deliver JMS Application Software

Objective: Deliver standard release JMS Server software, JMS Workstation software and JMS supporting Software, including applicable JMS software licenses, as purchased by the WC and specified in the Contract. JMS will be provided as a single production instance, supporting the Adult Correctional Facility, and a single test/training instance.

Task Description:

Complete the delivery of standard release JMS server software, the JMS Workstation Application software, and all applicable JMS and supporting software licenses as indicated in the Contract. This includes all software components (media), including applicable documentation (electronic software manuals) as listed in the purchase contract.

JMS Modules include the following. *(Review specific task detailed in this document for configuration and modifications to be developed)*

Master Inmate Management (JMS Master Inmate)

Standard, general release, JMS system master inmate management application. Included administrative Index management application, merge, expunge and seal.

Booking

General booking process forms.

Inmate Property

General release, inmate property modules.

Jail Incident Reporting

Standard, general release, jail incident management.

Jail Housing

Standard, general release, jail housing management.

Inmate Classification/Assessment

Standard, general release, inmate classification/assessment.

Inmate Sentencing

Standard, general release, inmate sentencing.

Jail Log

Standard, general release, jail Log.

Inmate Movement

Standard, general release, inmate movement.

Inmate Meal Restrictions

Standard, general release, inmate meal restrictions.

Inmate Release



Standard, general release, inmate release.

Inmate Schedule

Standard, general release, inmate schedule.

Inmate Transport

Standard, general release, inmate transport.

Jail Reporting

Standard, general release, jail reporting module.

Inmate Visitation

Provide standard, general release, inmate visitation.

Professional Visitation

Provide standard, general release, professional visitation module

Inmate Mugshot

Provide standard, general release, advanced mugshot module.

Inmate Lineup

Provide standard, general release, inmate lineup module.

Programs Module

According to task SFTW 5

Responsibilities:

EIS will:

- a) Deliver all contracted software components, including applicable documentation (software manuals), as listed in Contract.

WC will:

- a) Accept software delivery and acknowledge receipt of EIS provided components.

Completion Criteria:

This task will be completed when the JMS software distribution set and third-party software components as listed in contract, are delivered to the WC at the location specified in the contract and accepted by WC as defined in the acceptance plan.

Task SFTW 2: Deliver M2 Server software

Objective: EIS will deliver the primary M2 software modules on standard exchange media. This includes all software components (media and software license) including applicable documentation (software manuals).

Task Description:

M2 operates as the system message switch and is utilized in support of system interfaces, including ORLEDS. Deliver M2 Server software, ORLEDS Adapter software, JMS-M2 interface and supporting Software required to connect to the M2 message switch, including applicable M2 software licenses, as purchased by the WC and specified in the Contract.



Responsibilities:

EIS will:

- a) Deliver all software components including applicable documentation (software manuals), as listed in Contract.

WC will:

- a) Accept software delivery and acknowledge receipt of EIS provided components.

Completion Criteria:

This task will be completed when M2 software distribution set and third-party software components as listed in contract, are delivered to the WC at the location specified in the contract.

Notes:

M2 is a general communication data switch utilized throughout the JMS system. M2 will be deployed to support an interfaced node supporting a direct connection to the State for ORLEDS /NCIC traffic. Specific ORLEDS interface components are listed in the "ORLEDS" interface description contained in the interface section of this SOW. ORLEDS broadcast and general notification services will not be provided through the M2 interface.

Task SFTW 3: Deliver JMS Pre-Booking Server Software

Objective: Deliver JMS Pre-Booking Server software licenses as purchased by the WC and specified in Contract on standard exchange media.

Task Description:

Complete the delivery of standard JMS Pre-Booking server software as indicated in the Contract delivered to the WC at the location specified in the contract.

Responsibilities:

EIS will:

- a) Deliver all software components including applicable documentation (software manuals) as listed in Contract.

WC will:

- a) Accept software delivery and acknowledge receipt of EIS provided components.

Completion Criteria:

This task will be completed when JMS Pre- Booking software distribution set as listed in contract, are delivered to the WC at the location specified in the contract.

Task SFTW 4: Deliver JMS Pocket JMS Software

Objective: Deliver JMS Pocket JMS software licenses for use on agency selected iOS wireless devices, as purchased by the WC and specified in Contract on standard exchange media.

Task Description:

Complete the delivery of standard JMS Pocket JMS software distribution sets as indicated in the Contract delivered to the WC at the location specified in the contract



Responsibilities:

EIS will:

- a) Provide deployment of software via the Apple store via redemption codes.

WC will:

- a) Accept software delivery and acknowledge receipt of EIS provided components.

Dependencies:

1. Sufficient wireless 802.11 connectivity throughout designated operational area.

Completion Criteria:

This task will be completed when Pocket JMS software is made available to the agency for deployment via the Apple application store via the redemption model.

Task SFTW 5: Deliver JMS Programs Application Software

Objective: Deliver JMS Programs Server software licenses as purchased by the WC and specified in Contract on standard exchange media.

Task Description:

Provide the standard version of the EIS Programs software as listed in the Contract. EIS installation staff will install and configure the supporting EIS Programs application software with the appropriate configuration options and permission set to an agency provided instance of IIS, on the designated County-provided server.

Responsibilities:

EIS will:

- a) Deliver all software components including applicable documentation (software manuals), as listed in Contract.

WC will:

- a) Accept software delivery and acknowledge receipt of EIS provided components.

Dependencies:

1. Agency provided IIS web server and supporting .NET Framework (4.8 or higher)
2. WC will provide configuration parameters as requested

Completion Criteria:

When JMS Programs Application software is installed to specifications outlined in SOW and contract.

Task SFTW 6: OPTIONAL: Deliver EIS Single Digit Fingerprint Verification Engine Software

Objective: Deliver EIS Biometric Engine and Fingerprint Verification module software licenses and workstation software as purchased by the WC and specified in Contract.

Task Description:

Provide the standard version of the EIS Biometric Engine (Server Component) and Fingerprint Verification module software licenses software (Client Licenses – Site) as listed in the Contract. EIS installation staff will install and



configure the supporting EIS Biometric Engine software with the appropriate configuration options and permission set required to support the delivered PS.NET application software, on the designated County-provided server.

Responsibilities:

EIS will:

- a) Deliver all software components including applicable documentation (software manuals), as listed in Contract.
- b) Provide purchased Biometric Engine and supporting finger matching algorithms.

WC will:

- a) Accept software delivery and acknowledge receipt of EIS provided components.
- b) Provide access to WC fingerprint database.

Dependencies:

- 1. None

Completion Criteria:

This task will be completed when EIS Biometric Engine and Fingerprint Verification module software distribution set as listed in contract, are delivered to the WC at the location specified in the contract.

Task SFTW 7: Deliver EIS Media Streaming Software

Objective: Deliver EIS Media Streaming Service software.

Task Description:

Provide the standard version of the EIS Streaming Media (Server Component) licenses software. The addition of the media streaming service will enable the storage and revival of video and audio files within the JMS Inmate media module and the incident report media module.

Note: EIS Streaming Media Services Server applications are comprised of a set of CPU & Disk IO intensive software components operating to managing the encoding and streaming of large volume multi-media files (Audio and video). When operating, these applications can have a significant impact on overall system resources. In order to minimize system level performance impacts the Media Streaming Services must be installed on a dedicated server with direct access to large volumes of network storage.

Responsibilities:

EIS will:

- a) Deliver all software components including applicable documentation (software manuals), as listed in Contract.

WC will:

- c) Accept software delivery and acknowledge receipt of EIS provided components.

Dependencies:

- 1. None

Completion Criteria:

This task will be completed when EIS Streaming Media Server software distribution set as listed in contract, are delivered to the WC at the location specified in the contract.



Task SFTW 8: Deliver JMS Documentation & WC System Deployment Documentation

Objective: Prepare and deliver documentation relating to the deployment of the JMS Workstations including the workstation build and field deployment procedures and any site specific administrative or end user documentation specified in the project or training plan.

Task Description:

The delivery includes providing Configuration manuals, Reference manuals, Training materials, and System Administration documents in an electronic form by loading into the software, not in printed form or on portable media.

Documentation Includes:

- System Deployment Guide
- Jail Users Guide
- Pocket JMS Users Guide
- Jail Training Guide
- Any other document specified in the project plan.

Responsibilities:

EIS will:

- a. Deliver deployment instructions, guides, manuals and related documents in electronic form as specified in the implementation plan.

WC will:

- a. Review and accept the standard JMS documents (described above) submitted by EIS.

Completion Criteria:

This task will be completed once EIS has prepared and delivered to the WC the System Deployment document specified above along with other documentation specified in the final project plan.



Installation and Configuration Services

Note: EIS will normally install the JMS software remotely prior to onsite configuration. The initial installation will be to production level servers and will include the approximation of NCIC and State required code table values. EIS will additionally provide a first cut data conversion including the JMS data migrated from the legacy systems for initial evaluation. EIS will then schedule an Installation/Configuration Workshop or series of workshops to install final system components, conduct system administrator training, configure the system, verify initial data conversion, and verify system operation. WC will be responsible to provide all system hardware unless specifically noted in the Contract or this Statement of Work.

Installation and Configuration Services Tasks

Task INS 1: Configure the WC-provided Microsoft SQL Server Database software on Production Server

Objective: Configure the WC-provided Microsoft SQL Server Database software on the production server, load JMS and supporting database schemas and certify the Microsoft SQL Server DB configuration as ready to use.

Task Description:

EIS installation staff will configure the supporting Microsoft SQL Server Database software with the system data tables and permission set required to support the delivered application software (and specified WC configurations), on the designated WC-provided server

Responsibilities:

EIS will:

- a) Install the baseline JMS and other licensed modules database schemas within this configuration.
- b) Test the initial operation of the baseline database subsystem and provide a status report to the WC's project manager upon completion.
- c) Provide written certification of successful installation.

WC will:

- a) Install and configure designated database server hardware on WC's network (Hardware).
- b) Provide access to WC-provided hardware/server components to EIS installers. WC provided hardware and/or software must meet EIS recommended specifications and configuration.
- c) Be available to address and answer questions, modify configurations, and modify security and permissions if required during the installation.
- d) Develop, test and implement a standard backup routine of the SQL database with EIS staff.

Dependencies:

- 1. Access to WC provided database server(s) as a DB administrator.

**Completion Criteria:**

This task will be completed upon the installation and configuration of the Microsoft SQL Server Database software on the database server and certified by EIS as ready to use as indicated in the implementation plan and accepted by WC.

NOTES:

All required network protocol connectivity, firewalls and web services required to attach the workstations and other system servers to the SQL Server database must be provided by the WC and must be operational prior to onsite installation by the EIS technicians.

Task INS 2: Configure the WC-provided Microsoft SQL Server Database software on Test/Training Server

Objective: Configure the WC-provided Microsoft SQL Server Database software on the Test/Training server, load JMS and supporting database schemas and certify the Microsoft SQL Server DB configuration as ready to use.

Task Description:

EIS installation staff will configure the supporting Microsoft SQL Server Database software with the system data tables and permission set required to support the delivered application software (and specified WC configurations), on the designated WC-provided test/training server

Responsibilities:

EIS will:

- a) Install the baseline JMS and other licensed modules database schemas within this configuration.
- b) Test the initial operation of the baseline database subsystem and provide a status report to the WC's project manager upon completion.
- c) Provide written certification of successful installation.

WC will:

- d) Install and configure designated database server hardware on WC's network (Hardware).
- e) Provide access to WC-provided hardware/server components to EIS installers. WC provided hardware and/or software must meet EIS recommended specifications and configuration.
- f) Be available to address an answer questions, modify configurations, and modify security and permissions if required during the installation.
- g)

Dependencies:

1. Access to WC provided database server(s) as a DB administrator.

Completion Criteria:

This task will be completed upon the installation and configuration of the Microsoft SQL Server Database software on the test/training database server and certified by EIS as ready to use as indicated in the implementation plan and accepted by WC.

NOTES:



All required network protocol connectivity, firewalls and web services required to attach the workstations and other system servers to the SQL Server database must be provided by the WC and must be operational prior to onsite installation by the EIS technicians.

Task INS 3: Install and Configure Licensed EIS Software on the WC-provided Production servers.

Objective: The objective of this task is to install and configure the baseline JMS application software and licenses on the designated WC-provided production servers as designated in the implementation plan in accordance with the finalized system configuration. Deliver and test the primary JMS software modules on the equipment installed/provided by the WC at WC facility.

Task Description:

Task includes:

- a. Baseline Oregon state code tables.
- b. Deployment of a standard JMS workstation installation/distribution set.
- c. Deployment of a standard supporting workstation installation/distribution set as noted in the project plan.

Responsibilities:

EIS will:

- a) Install and test, with the WC's assistance, the licensed JMS software to the designated production servers.
- b) Provide the WC with the training necessary to prepare WC personnel with the ability to deploy the JMS client software on additional workstations.
- c) Test the initial operation of the baseline JMS system and supporting subsystems.
- d) Certify that the configuration is complete and ready to use.
- e) Provide deployment instructions and data communication settings required to deploy workstation software.

WC will:

- a) Perform site and hardware preparation as described and certify that Production Servers are ready to receive application software.
- b) Ensure all WC provided hardware meets minimum required specifications.
- c) Ensure all required network protocol connectivity, firewalls and web services required to attach the JMS application to the SQL Server database, are provided by the WC and certified as operational prior to onsite installation by the EIS technicians.
- d) Deploy the JMS software either over the network or with the assistance of EIS staff to all desired workstations.
- e) Review system configuration and report any discrepancies to EIS Installation staff within 5 days of EIS certification.

**Completion Criteria:**

This task will be completed upon the installation and configuration of an operational JMS baseline application software on WC provided JMS servers (Production servers) and the delivery of a standard software workstation deployment set that is acceptable by WC as defined in the acceptance plan.

Task INS 4: Install and Configure Licensed EIS Software on the WC-provided Test/Training servers.

Objective: The objective of this task is to install and configure the baseline JMS application software and licenses on the designated WC-provided Test/Training servers as designated in the implementation plan in accordance with the finalized system configuration. Deliver and test the primary JMS software modules on the equipment installed/provided by the WC at WC facility. The test instance(s) will be configured to provide an independent version of the core JMS system for test and training purposes. The instance will be fully isolated from the production environment and will not be able to support extended system functions and interfaces to 3rd party systems.

Task Description:

Task includes:

- a. Baseline Oregon state code tables.
- b. Deployment of a standard JMS workstation installation/distribution set.
- c. Deployment of a standard supporting workstation installation/distribution set as noted in the project plan.

Responsibilities:

EIS will:

- a) Install and test, with the WC's assistance, the licensed JMS software to the designated test/training servers.
- b) Provide the WC with the training necessary to prepare WC personnel with the ability to deploy the JMS client software on additional workstations.
- c) Test the initial operation of the baseline JMS system and supporting subsystems.
- d) Certify that the configuration is complete and ready to use.
- e) Provide deployment instructions and data communication settings required to deploy workstation software.

WC will:

- a) Perform site and hardware preparation as described and certify that Test/Training Servers are ready to receive application software.
- b) Ensure all WC provided hardware meets minimum required specifications.
- c) Ensure all required network protocol connectivity, firewalls and web services required to attach the JMS application to the SQL Server database, are provided by the WC and certified as operational prior to onsite installation by the EIS technicians.
- d) Deploy the JMS software either over the network or with the assistance of EIS staff to all desired workstations.



- e) Review system configuration and report any discrepancies to EIS Installation staff within 5 days of EIS certification.

Completion Criteria:

This task will be completed upon the installation and configuration of an operational JMS baseline application software on WC provided JMS servers (Test/Training servers) and the delivery of a standard software workstation deployment set that is acceptable by WC as defined in the acceptance plan.

Task INS 5: Install and Configure the JMS Pre-Booking Application

Objective: Install Pre-Booking software and provided supporting software required to collect Pre-Booking inmate Information via web application, as purchased by the WC and specified in Contract.

Task Description:

EIS will install and test the Pre-Booking software modules on the WC provided equipment at WC facility. The Pre-Booking application will support the generation of officer-based booking commitments including inmate demographic, arrest, charges, property and detainer declarative statement within a browser environment. The objective of this task is to install, and configure the baseline JMS Pre-Booking application software, on the designated WC-provided IIS server as designated in the implementation plan in accordance with the finalized system configuration. Deliver and test the primary EIS JMS Pre-Booking software modules on the equipment installed/provided by the WC at WC facility.

Task includes:

- a. The configuration of the JMS Pre-Booking web software installed on the designated server to conform to the baseline JMS Pre-Booking (not including WC specific configurations and customizations).

Responsibilities:

EIS will:

- a) Install and test, with the WC's assistance, the licensed JMS Pre-Booking software to a standard IIS environment provided by the WC
- b) Test the initial operation of the baseline JMS Pre-Booking system.
- c) Certify that the configuration is complete and ready to use.

WC will:

- a) Provide a configured instance of IIS on desired server to host the pre-booking application.
- b) Ensure all WC provided hardware meets minimum required specifications.
- c) Ensure all required network protocol connectivity, firewalls and web services required to attach the JMS Pre-Booking application to the SQL Server database are provided by the WC and be operational prior to onsite installation by the EIS technicians.
- d) Review system configuration and report any discrepancies to EIS Installation staff within 5 days of EIS certification.

Completion Criteria:

This task will be completed upon the installation and configuration of an operational JMS Pre-Booking baseline application software on WC provided JMS servers (Production and Training servers) and the delivery of a standard software workstation deployment set accepted by WC as defined in the acceptance plan.



Task INS 6: Install and Configure the JMS Programs Application

Objective: Install Programs software and provided supporting software required to support the Inmate Programs application, as purchased by the WC and specified in Contract.

Task Description:

EIS will install and test the Inmate Programs software modules on the WC provided equipment at WC facility. The Programs application will support the generation of jail provided classes, organize inmate enrollment and track participation with enrolled classes within a standard browser environment. The objective of this task is to install, and configure the baseline JMS inmate programs application software, on the designated WC-provided IIS server as designated in the implementation plan in accordance with the finalized system configuration. Deliver and test the primary EIS JMS Programs software modules on the equipment installed/provided by the WC at WC facility.

Task includes:

- a. The configuration of the JMS Inmate Programs web software installed on the designated server to conform to the baseline JMS Inmate Programs (not including WC specific configurations and customizations).

Responsibilities:

EIS will:

- a) Install and test, with the WC's assistance, the licensed JMS Inmate Programs software to a standard IIS environment provided by the WC
- b) Test the initial operation of the baseline JMS Inmate Programs system.
- c) Certify that the configuration is complete and ready to use.

WC will:

- a) Provide a configured instance of IIS on desired server to host the Inmate Programs application.
- b) Ensure all WC provided hardware meets minimum required specifications.
- c) Ensure all required network protocol connectivity, firewalls and web services required to attach the JMS Inmate Programs application to the SQL Server database are provided by the WC and be operational prior to onsite installation by the EIS technicians.
- d) Review system configuration and report any discrepancies to EIS Installation staff within 5 days of EIS certification.

Completion Criteria:

This task will be completed upon the installation and configuration of an operational JMS Inmate Programs baseline application software on WC provided JMS servers (Production and Training servers) and the delivery of a standard software workstation deployment set accepted by WC as defined in the acceptance plan.

Task INS 7: Install M2 Server software

Objective: M2 operates as the internal system message switch and is utilized in support of system interfaces, including ORLEDS/NCIC. Install M2 Server software, JMS-M2 interface and JMS supporting Software required to connect to the M2 message switch including applicable M2 software licenses, as purchased by the WC and specified in Contract.



Task Description:

EIS will install and test the primary M2 software modules on the application server equipment installed/provided by the WC at WC facility. Task includes the installation of the M2 software to the WC provided application server and configuration to communicate with the JMS SQL Database.

Responsibilities:

EIS will:

- a) Install all M2 software components including applicable documentation (software manuals) as listed in Contract.
- b) Install base M2 software applications and configure to WC environment.
- c) Configure switch queues and transaction configurations.
- d) Test installation of M2 and certify that the M2 subsystem has been successfully installed and prepared to receive WC specific message templates.

WC will:

- a) Provide appropriate hardware and operating platform to support the M2 application on the system application server.
- b) Be responsible for application for new ORLEDS mnemonics as required to meet County access needs.
- c) Be available to address an answer questions, modify configurations, and modify security and permissions if required during the installation.
- d) Acknowledge receipt of EIS provided components.

Dependencies:

1. Access to WC provided application server.

Completion Criteria:

This task will be completed M2 software distribution set and third-party software components as listed in Contract are installed on the WC provided application server and certified as "Ready to Use" by EIS installation personnel and verified as operational by WC as defined in the acceptance plan.

Task INS 8: Conduct JMS System Configuration Workshop

Objective:

Conduct an Installation/Configuration workshop with the WC Project Team to install, conduct system administrator training, configure, and verify the system components.

Task Description:

System Configuration and WC administrator training is normally conducted in a workshop at the WC or series of workshops. A single workshop is preferred and is normally one week. The purpose of this workshop is to ensure all systems and components are installed, assist the WC with configuring JMS code tables, and system administrator training to selected WC personnel that will administrator the JMS system. This workshop is not intended for live operation. The identified system administrators will validate the operation of the system and the initial data conversion.



At the end of this workshop, the key WC staff should be familiar with the use and configuration of the system. Key WC staff should be able to complete security setup, table maintenance, and other end-user configuration tasks necessary for live operation. System Configuration Acceptance Testing to occur on completion of this task.

Responsibilities:

EIS will:

- a) Ensure all JMS components are installed and functioning properly.
- b) Train selected WC system administrators and other key staff in the theory, use, and configuration of the system.
- c) Review with WC project team the specific JMS application functionality and code tables for which information must be collected to configure the system and assist the WC with configuration.
- d) Assist WC with testing and validating data conversion for completeness and accuracy.
- e) Provide WC with a Workshop schedule sufficient time agreed to by both parties in advance of the workshop.

WC will:

- a) Identify JMS system administrators and key project personnel to attend the workshop and insure their availability.
- b) Identify data sources for all system code tables and other WC operational parameters.
- a) System administrators to become comfortable and familiar with JMS system administration, table configuration, system security, workflow, and operational principles.

Dependencies:

1. Completion of the system functional review.
2. Deployed JMS software to WC production machines.
3. Deployed JMS workstation software to workstations to be utilized by during the review session.

Completion Criteria:

This task is considered complete when EIS has concluded the JMS Configuration Workshop and identified to the WC the configurable options for the JMS application.

Task INS 9: JMS Functional Testing

Objective: Perform functional tests of JMS.

Task Description:

Demonstrate the applicable functions and features of JMS as defined in the JMS Acceptance Test Plan.

Responsibilities:

EIS will:

- a) Utilize the JMS Acceptance Test Plan as a guideline for all functional tests.

WC will:

- a) Generate test data files needed for functional testing.



Completion Criteria:

This task is considered complete when JMS has been demonstrated to operate in accordance with the Acceptance Test Plan and WC verifies the testing has successfully passed all the guidelines.

System Preparation

Project Configuration and Development Tasks

Task Dev 1: JMS Configuration and Development

Objective: EIS to provide configuration/modifications to the core JMS product as part of the deployment to meet WC operational objectives.

Task Description:

EIS will provide the following system configuration/customizations to the core JMS product as already discussed with WC. As part of the installation activities, EIS will work with the WC to develop a final system configuration/customization specification. All modifications will be incorporated into the base JMS product.

Functional Modifications Include:

General JMS

1. Definition of the WC workflow via the module tree presented within the primary JMS system within the existing workflow configuration options. There is no development work for this item.
2. Provide an agreed upon set of up to twenty (20) customized SSRS reports within the JMS. Reports can capture electronic signatures as part of report generation. Additional reports can be added to the project as need based on the standard EIS report development fees.
3. Provide Support for up to (5) Fillable PDF reports associated with inmate record.
4. Configure booking dashboard to display select subsets of the validation rule compliance indicator (Pass/Fail), within the current supported system ability and current configuration options. There is no development work for this item.

Accounting (inmate)

1. None – Will not be utilized as agency is utilizing Keefe.

Pre-Booking

1. Deploy and configure standard prebook application.
2. Configuration/development of up to (4) four printable booking document for implementation in the prebook module.



Booking and Booking Complete Screen

1. Configure jail validation rules within the current configuration options.

Mugshot and Imaging

1. None

Inmate Property Screen

1. None

Charge Screen

1. Provide field level review and enable/disable fields per agency preference within the currently supported configuration options.

Bail/Bond Screen

1. Deploy bail statement report to reflect WC's bail grouping and value calculation protocol.

Sentencing and Sentence Calculation

1. Configure and deploy initial sentence calculation tool within the sentence screen. Calculator will include sentence parameters associated with the charge and apply the good time and other standard calculated values in accordance with State of Oregon Standards. Additional details will be documented in a specification Sentence Calculation specification to be developed and approved by the EIS and WC.

Inmate Release

1. Configure inmate release dashboard/listing to include the WC required release data clearance elements within the current feature set of the application within the current configuration options.
2. Definition of the required/desired release validation rule indicators provided on the inmate release screen within the current configuration options.

Inmate Programs

1. Provide external EIS JMS programs Module

Inmate Contact

1. None

Inmate Visitation

1. Track visitor time arrived and credential check per mutually agreed specification.
2. Configure visitation location tracking per mutually agreed specification.

Inmate Housing

1. None

Jail and Inmate Logs

1. None



Professional Visitation

1. None

Inmate Transportation

1. None

Inmate Incident Reporting

1. None

Inmate Billing

1. None.

Inmate Classification

1. Configure inmate classification questionnaires and risk assessment responses within the current configuration options.

Responsibilities:

EIS will:

- a. Provide the above configuration/development changes.

WC will:

- a. Review and accept above listed configuration/development changes.
- b. Ensure that necessary certifications, approvals and other related issues will be completed by the WC at least ninety (90) calendar days prior to scheduled interface work.
- c. Ensure that the necessary technical support is made available for installation, testing and demonstration of the interfaces.
- d. Identify in writing each discrepancy between subsystem functionality and the provided EIS configuration/programming documentation.

Dependencies:

1. WC acceptance of EIS provided configuration/development changes.

Completion Criteria:

This task is considered complete when the JMS configuration and development enhancements have been deployed to the WC production instance of the JMS, has passed acceptance testing, and accepted by the WC project manager.

Task Dev 2: Jail Report Development

Objective: Develop and deliver departmental report/output and system printouts as determined in accordance with the contract and as agreed to during the system configuration review. Deliver up to 20 agency specific customized reports/printout generated from the JMS.



Task Description:

EIS will review the existing reports and printouts generated by the EIS JMS product and assist the agency in finding solutions for discrepancies in required reports and printouts, not existing in the system. EIS will provide 20 reports/printouts to be defined by WC for inclusion on the product under the terms of the agreement. Additional reports/printouts can be added via change order.

Responsibilities

EIS will:

- a) Schedule and participate in meetings and/or teleconferences to define the requirements of the departmental report/output and system printouts.
- b) Advise WC staff on report/printout options to meet requirements

WC will:

- a) Evaluate the JMS product existing report/printout options and notify EIS of discrepancies for new/changes to the allotted 20 provided.

Completion Criteria:

This task will be completed when the listed departmental (20) report/output and system printouts have been created, deployed, verified and accepted by WC.



Interface Tasks

All system interfaces will be developed and deployed in accordance with the EIS interface specifications accepted by the WC. Once accepted, the development interface specification will be the final document and be incorporated into the contract forthwith. All interfaces are subject to dependencies and are partially reliant on factors beyond the control of EIS. As such, the deliverable items related to all interfaces are directly dependent on the availability of external resources (connections to foreign systems, data, and other external components). EIS interface will be installed, however, EIS has no control over other vendors and their timeline/ability to bring their side of the interface operational. Delays related to the required dependencies are not the responsibility of EIS.

All interfaces with other products will be completed as quickly as possible, however without the cooperation of the third-party software vendors, implementation could be delayed. This would not be the responsibility of EIS and outside the scope of the SOW.

In the event current vendors change between execution of the contract and implementation a change order will be required for the new interface due to existing interfaces have been quoted based on EIS having existing experiences and our interfaces. While EIS will attempt to use existing interfaces for new requirements if possible, EIS reserves the right to require additional cost for interface changes post contract.

EIS will develop the following agreed upon interfaces as part of this project. The responsibilities for each interface incorporate the following supporting activities from each party:

EIS:

- a) Develop interface development specification detailing interface for WC Acceptance.
- b) Develop software service/application that functions in accordance with the Interface Development Specification.
- c) Certify to the WC that the interface is ready for integration testing.
- d) Assist the WC in testing the vendor interface if possible.
- e) Review any discrepancies that are identified by the WC.
- f) Provide software or documentation corrections as needed to correct the discrepancies prior to EIS Final Certification.
- g) Certify EIS delivered interface for production operation.

WC:

- a) Provide, on request, currently existing information, record layouts and documents necessary to establish interfaces with all local and remote systems and facilities at least ninety (90) days prior to interface installation.
- b) Review and accept the EIS provided interface programming specification in accordance with contract specifications.
- c) Assume responsibility for any modifications or additions to any existing or non-EIS supplied systems required to enable them to support the interfaces, as defined in the Functional System Description, Change List, and interface control documents.
- d) Provide and install all communications lines and equipment according to the contract documents.
- e) Provide all required liaison support with the vendors/agencies and EIS project management required to support the interfaces.



- f) Ensure that necessary certifications, approvals and other related issues will be completed by the WC at least ninety (90) calendar days prior to scheduled interface work.
- g) Ensure that the necessary technical support is made available for installation, testing and demonstration of the interfaces.
- h) Conduct test procedures and verify all inter-system communications between installed EIS systems and non-EIS systems to ensure conformance with the approved standard document and interface control documents.
- i) Identify in writing each discrepancy between subsystem functionality and the provided EIS interface documentation and interface control documents.
- j) Work with EIS to identify the type of correction needed to ensure that each subsystem conforms to the EIS standard documents and interface control documents.

Task Inter 1: JMS to Cogent Livescan Interface Export

Objective: Implementation of the EIS Cogent live scan interface. Provide a data transfer export of inmate demographic, arrest and charge data from the JMS to the WC's existing Cogent livescan system. Interface will be provided for the adult correctional facility.

Task Description:

Cogent is the current livescan vendor. The WC is seeking to minimize duplication of data entry into the JMS across multiple systems. The interface is a one-way provision of inmate and arrest data to the Cogent livescan. Currently there is a single Cogent livescan system housed in the main booking area of the WC Jail.

EIS has an existing EIS JMS/Cogent interface that has been quoted for this project. That interface will be implemented for this project. In the event that changes are required to that interface a change order and possible fee will be included to cover the change to the proposed interface.

Please note that it is the WC's responsibility to coordinate/contract with Cogent to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from Cogent will be the sole responsibility of the WC. An EIS development specification detailing the interface will be provided to the WC for acceptance prior to the development/deployment of the EIS interface component.

EIS:

- a) Deploy the EIS JMS/ Cogent export interface.

WC:

- a) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- b) Ensure interface dependencies have been addressed.

Dependencies:

1. WC acceptance of EIS provided interface deployment/programming specification.
2. Provision of the Cogent side of the interface.
3. Network Access to the required transaction point on the WC Network.
4. Assist the WC in testing the Cogent interface.



Completion Criteria:

This task is complete when the system interface is functioning as described above and accepted by WC in accordance with the system acceptance test.

Note: EIS will not sub-contract development work on behalf of Cogent.

Task Inter 2: Cogent to JMS Livescan Interface Import

Objective: Provide a data transfer import into the JMS of inmate information returned from Cogent to include the state assigned identifiers, such as FBI, SID and local Identification fields.

Task Description:

EIS has an existing bi-directional interface that can be implemented and provided to Cogent for implementation. This will allow EIS to import changes to the FBI/SID/AFIS/Local ID from Cogent to EIS JMS>

All costs (if any) associated with the provision of the interface from Cogent will be the sole responsibility of the WC. An EIS development specification detailing the interface will be provided to the WC for acceptance prior to the deployment of the EIS interface component.

EIS:

- a) Deploy existing Cogent import interface.

WC:

- a) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- b) Ensure interface dependencies have been addressed.

Dependencies:

1. WC acceptance of EIS provided interface deployment/programming specification.
2. Provision of the Cogent side of the interface.
3. Network Access to the required transaction point on the WC Network.
4. Assist the WC in testing the Cogent interface.

Completion Criteria:

This task is complete when the system interface is functioning as described above and accepted by WC in accordance with the system acceptance test.

Task Inter 3: JMS to APPRISS (VINE) Interface

Objective: Appriss provides a one-way extraction of jail data directly from the active EIS JMS database via a direct connection to production database or via managed database view. EIS, with assistance from County IT, will construct a read only SQL view exposing a select sub-set of JMS data to be used by Appriss for the purpose of supporting the VINES interface. Data base access and access accounts provided to Appriss will be provided by the County

Task Description:

None.

Additional Responsibilities:

EIS will:



- a) None

WC will:

- a) Coordinate installation with Appriss representative.
- b) Manage responsibilities as enumerated in the general “Interface Task” section of the SOW.
- c) Ensure interface dependencies have been addressed.

Dependencies:

1. Network Access to the EIS JMS database (ODBC) for the Appriss provided extraction service via the WC Network.

Completion Criteria:

Database views have been established and published to the production JMS database in accordance with the view specifications. Database access and user accounts will be provided by County IT. All data extraction processes from the exposed views to feed the VINES system and any additional interface software required to be provided directly from Appriss. Interface will be formally acknowledged as complete by WC in accordance with the system acceptance test.

Task Inter 4: JMS to GTL (Inmate Telephone) Interface

Objective: Provide a scheduled data transfer export package to GTL that includes the demographic, housing location information and LOP (Loss of Privilege) (or select JMS alerts) indicator(s) for all inmates currently active within the Washington County jail.

Task Description:

GTL is the current inmate telephone vendor, and the WC is seeking to minimize duplication of data entry into the JMS across multiple systems. The interface is a one-way push of inmate and inmate housing location data to the GTL system. The exported JMS data will be utilized by GTL for the purpose of managing inmate telephone accounts within the jail.

The data export package will be formatted to conform to the existing data export standards currently utilized between EIS and GTL. The interface can be set to operate on a WC defined interval during installation. EIS will receive no acknowledgement returned from GTL as part of this transaction. An EIS development specification detailing the interface will be provided to the WC for acceptance prior to the deployment of the EIS interface component.

Please note that it is the WCSO’s responsibility to coordinate/contract with GTL to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from GTL/TelMate will be the sole responsibility of the WC.

EIS will:

- a) Deploy existing GTL export interface.

WC will:

- a) Coordinate installation with GTL/TelMate representative.
- b) Manage responsibilities as enumerated in the general “Interface Task” section of the SOW.
- c) Ensure interface dependencies have been addressed.

Dependencies:

1. WC acceptance of EIS provided interface programming specification.



2. Current Interface specification reflecting expected data format and transaction control protocol from GTL
3. Network Access to the required transaction/interchange point via the Washington County Network.

Completion Criteria:

This task is considered complete when the system interface can extract the inmate data as designated in the development specification and writing the properly formatted export data to the designated transaction FTP location.

EIS will not sub-contract development work on behalf of GTL.

Task Inter 5: EIS JMS to Keefe Interface

Objective: Provide a scheduled data transfer export package to the Keefe system that includes the demographic, housing location and LOP (Loss of Privilege) indicator for all inmates currently active within the Washington County jail.

Task Description:

Keefe is the current inmate commissary and inmate accounting vendor, and the WC is seeking to minimize duplication of data entry into the JMS across multiple systems by having data entered into the JMS transferred to the Keefe system. The interface is a one-way push of inmate and inmate housing location data to the Keefe system.

The data export package will be formatted to conform to the data export standards currently provided by EIS related to Keefe. The interface can be set to operate on WC defined interval during installation or on a specified triggering event. EIS will receive no acknowledgement returned from Keefe as part of this transaction. An EIS development specification detailing the interface will be provided to the WC for acceptance prior to the deployment of the EIS interface component.

Please note that it is the WC's responsibility to coordinate/contract with Keefe to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from Keefe will be the sole responsibility of the WC.

EIS will:

- b) Deploy existing Keefe export XML interface.

WC will:

- d) Coordinate installation with Keefe representative.
- e) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- f) Ensure interface dependencies have been addressed.

Dependencies:

1. WC acceptance of EIS provided interface programming specification.
2. Current Interface specification detailing the existing EIS-Keefe interface.
3. Network Access to the required transaction/interchange point via the Washington County Network.

Completion Criteria:

This task is considered complete when the system interface can extract the inmate data as designated in the development specification and writing the properly formatted export data to the designated transaction point via the Washington network.

Note: EIS will not sub-contract development work on behalf of Keefe.



Task Inter 6: JMS to NaphCare Interface

Objective: Provide a data transfer export package to the NaphCare system that includes the demographic, housing location and relevant inmate information for each active inmate active in the jail at the transaction.

Task Description:

NaphCare is the current inmate medical provider (System) within the WC jail. The interface is intended to provide a subset of inmate data entered into the JMS to the NaphCare system. The interface is a one-way push of inmate and inmate housing location data to the NaphCare system. The interface is intended to update the NaphCare system when the inmate is activated within the JMS, when a housing location change occurs and when the inmate is released from custody. There is no HIPAA data exchanged.

The data export package will be formatted to conform to the data export standards mutually agreed to between EIS and the NaphCare vendor. The interface can be set to operate on a WC defined interval during installation. EIS will receive no acknowledgement returned from NaphCare as part of this transaction. An EIS development specification detailing the interface will be provided to the WC for acceptance prior to the commencement of interface programming.

Please note that the initial interface scope has been derived from information provided by the WC during requirement statements contained in the original RFP. It is the WC's responsibility to coordinate/contract with NaphCare to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from NaphCare will be the sole responsibility of the WC.

EIS will:

- c) Deploy NaphCare export interface.

WC will:

- g) Coordinate installation with NaphCare representative.
- h) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- i) Ensure interface dependencies have been addressed.

Dependencies:

1. WC acceptance of EIS provided interface programming specification.
2. Current Interface specification reflecting expected data format and transaction control protocol from WC for NaphCare interface.
3. Network Access to the required transaction/interchange point via the WC Network.

Completion Criteria:

This task is considered complete when the system interface is capable of extracting the inmate data as designated in the development specification and writing the properly formatted export data to the designated transaction point via the WC network or service entry point defined in the interface specification.

Interface will be formally acknowledged as complete by WC in accordance with the system acceptance test.

Note: EIS will not sub-contract development work on behalf of NaphCare.



Task Inter 7: NaphCare to JMS Interface

Objective: Import medical alerts and Dietary restrictions from data provided from NaphCare.

Task Description:

NaphCare is the current inmate medical provider (System) within the WC jail. The interface is intended update the inmates booking record with dietary restrictions recorded in NaphCare and/or alerts associated with the inmate's medical record. There is no HIPAA data exchanged.

NaphCare will provide the EIS interface service with a data package containing sufficient inmate identifiers to establish a link between the NaphCare data with the inmate's active booking record in JMS. The data package must contain sufficient information to identify the nature of the update – either dietary or alert. Dietary updates will be posted to the inmate's meal restriction record on the active booking. Alerts will be posted to the inmate alert portion of the inmates active booking record. An EIS development specification detailing the interface will be provided to the WC for acceptance prior to the commencement of interface programming.

Please note that the initial interface scope has been derived from information provided by the WC during requirement statements contained in the original RFP. It is the WC's responsibility to coordinate/contract with NaphCare to ensure that the interface service is available and ready for use. All costs (if any) associated with the provision of the interface from NaphCare will be the sole responsibility of the WC.

EIS will:

- d) Scope and develop the NaphCare import interface
- e) Deploy NaphCare import interface.

WC will:

- a) Coordinate installation with NaphCare representative.
- b) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- c) Ensure interface dependencies have been addressed.

Dependencies:

1. WC acceptance of EIS provided interface programming specification.
2. Current Interface specification and sample data files reflecting expected data format and transaction control protocol from WC for NaphCare interface.
3. Network Access to the required transaction/interchange point via the WC Network.

Completion Criteria:

This task is considered complete when the system interface is capable accepting a standard data package from NaphCare and perform the creation of the appropriate updates to the inmates active booking record as defined in the interface specification.

Interface will be formally acknowledged as complete by WC in accordance with the system acceptance test.

Note: EIS will not sub-contract development work on behalf of NaphCare.



Task Inter 8: ORLEDS Interface MKE's

Objective: Provide ORLEDS/NCIC software adapter within the M2 data switch and supporting a defined set of message keys (MKE's) used for inquiry transactions with to ORLEDS through the State of Oregon's data switch. Provided message keys will be associated with entity records contained within the JMS system, and include a defined sub-set of ORLEDS transactions. Keys will be embedded within the Jail entity forms (Persons and vehicles) and provide return routing to the initiating user. The system includes the standard 6 inquiry messages.

Task Description:

The interface will extract relevant data, where available, from the enabled JMS data screens to populate the provided Message forms as part of the ORLEDS request, eliminating redundant data entry. Within the JMS, any authorized user can select the related transaction type from the enabled form. The application will open the selected ORLEDS mask and populate the mask with the relevant data previously entered into the JMS record. The user selected the appropriate message key and enters any additional data required (or optional) related to the specified key. When complete the user selects the submit button, and the message is passed to the M2 gateway for processing. The message is formatted, submitted to the State and the return is received by the switch and routed back to the user for viewing. Inquiry transactions can support the following types of messages, specific supported message keys are document in attachment:

1. Query
2. Supporting as indicated

Inquiry Functions: Includes the standard set of inquiry transactions (Message Keys) embedded within the JMS. Standard keys include: General Person Query, General Vehicle Query, General Property Query, and Warrant Query. Requires base M2 Switch and ORLEDS adapter. Additional (optional) message keys can be added as needed on a T & M basis. Requires connection to the State provided by WC.

The ORLEDS query keys will be defined for JMS screens separately

ORLEDS Inquiry Adapter (Standard Transaction Message Keys)

Query CCH By Name (QWHD)
 Query by LNU (QLW)
 Locate Warrant (LW)
 Query Parole & Probation (QCD)
 Hit Confirmation (YQ)
 RAP Sheet by SID/FBI (RR)
 Drivers License (DLR)
 Administrative Message (AM)

Additional Task Responsibilities:

EIS will:

- a) Review and define supported message keys with WC.
- b) Configure M2 with ORLEDS/NCIC/NLETS forms to support the message formats required by ORLEDS, and to extract designated inmate/arrest data from the JMS to prepopulate ORLEDS masks.



- c) Configure the M2 switch with appropriate routing information.
- d) EIS will ensure EIS employees, and subcontractors comply with the agency security and access requirements as identified in the master contract.

WC will:

- a) Request additional keys if required for change order.
- b) Request the required mnemonics from the state.
- c) Agency will adhere to appropriate CJIS security at location that will utilize the ORLEDS features.
- d) Agency to provide dedicated ORLEDS connection will be provided for JMS traffic.
- e) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- f) Ensure interface dependencies have been addressed.

Dependencies:

1. WC acceptance of EIS provided interface programming specification.
2. WC has provided appropriate mnemonics from the state.
3. WC adheres to appropriate CJIS security at location that will utilize the ORLEDS features.
4. Dedicated ORLEDS connection is provided for JMS traffic.
5. Installation of the M2 data switch.
6. Installation and configuration of the M2 ORLEDS adapter.

Completion Criteria:

This task is complete when the system interface is capable of;

- a) Processing the query request through the M2 data switch and successfully transmitting to ORLEDS.
- b) Receiving the data returns from ORLEDS and routing to the requesting user's message queue and activating the message queue indicator within the JMS.
- c) Displaying the textural return to the user on request within the JMS environment.

Interface will be formally acknowledged as complete by WC in accordance with the system acceptance test.

Task Inter 9: JMS Inmate Employment "EOD" information Export

Objective: Provide JMS standard export report designed to generate a properly formatted data package containing inmates incarcerated within the jail during the user specified data range.

Task Description:

EIS will deploy a data export standard report designed to generate a properly formatted data package containing inmates incarcerated within the jail during the user specified data range. Once executed, the process will generate a data file containing the relevant inmate information and write the file to a local file. The file can then be accessed and transmitted to the state of Oregon Employment division as required.

EIS will:

- a) Standard report export to local file.

WC will:

- a) None



Dependencies:

1. None.

Completion Criteria:

This task is considered complete when the system export process is capable of extracting the JMS current inmate custody information based on the user provided date range criteria from the JMS, prepare a properly formatted data file in accordance with the file specification and successfully write the data file to a local hard drive or UNC path.

Task Inter 10: JMS SSA information Export

Objective: Provide JMS standard export function designed to generate a properly formatted SSA data package containing inmates incarcerated within the jail during the user specified data range.

Task Description:

EIS will deploy the standard SSA export function accessible within the JMS management utilities.

EIS will:

- a) Standard SSA report export to local file.

WC will:

- b) None

Dependencies:

1. WC acceptance of EIS provided interface/export specification.

Completion Criteria:

This task is considered complete when the system export process is capable of extracting the JMS current inmate custody information based on the user provided date range criteria from the JMS, prepare a properly formatted data file in accordance with the file specification and successfully write the data file to a local hard drive or UNC path.

Task Inter 11: DL Data Scan to JMS Names

Objective: Provides data entry capability into the designated JMS names screen from data encoded into the designated Driver's License credential eliminating the need for the users to perform manual data entry into JMS data screens associated with persons.

Task Description:

EIS to deploy the EIS Text to Data Engine and 2 State DL processing templates, including:

- a. State of Oregon Driver's License data map
- b. State of Washington Driver's License data map

Data Screens supported include:

- a. Inmate Identification Form
- b. Professional Visitors Form
- c. Inmate Contact form
- d. Visitors Form

**NOTE: TEXT TO DATA ENGINE & DL CREDENTIAL MAPPING TEMPLATES**

The engine is used to convert serial text to data elements that can be users within the EIS applications to reduce or eliminate manual data entry. The Text to Data engine will accept data from scannable credentials (e.g. Drivers Licenses) and create a parsed data collection with the ability to map the individual data items to data entry fields presented on selected JMS person screens. A detailed specification will be prepared on the details of this feature. However, only data present in the encoded ID card and/or return data is an option for parsing and screen population.

The DL credential to data capability is intended to reduce or eliminate direct data entry whenever a scannable credential is available, such as a state driver's license. The EIS software in conjunction with an appropriate scanning device (bar code or magnetic stripe) is capable of translating data encoded within the credential, and populating data screens within the JMS using the received information. Credential encoded data formats are typically unique and will require specific interface mapping templates for each credential. The mapping templates process the incoming encoded data and populate the designated data fields within the EIS applications.

EIS will:

- a) Deploy the licensed EIS Text to Data engine.
- b) Prepare data mapping templates for the referenced credentials.

WC will:

- a) Provide supported scan hardware devices to the designated workstations.
- b) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- c) Ensure interface dependencies have been addressed.

Dependencies:

1. Provision and configuration of EIS Supported USB scan devices.

Completion Criteria:

This task is considered complete when on an enabled data screen, the user can successfully scan either a WA State or OR State driver's license and have the related person information appear in the application form fields.

Task Inter 12: Karpel PBK Data View

Objective: Provide JMS SQL database view to replace the current data view utilized by Karpel.

Task Description:

EIS will assist Washington County IT in the development of a database view for the purpose of providing real time Jail data to the prosecutor's system. EIS will provide technical assistance to the IT team in the identification of data and database relationships sufficient in scope to establish a replacement SQL data view. It is estimated that sixteen hours (16) of EIS development support will be required for this task and are included in statement of work.

EIS will:

- a) Provide database architecture and recommendation related to data structures within the jms database.

WC will:

- a) Develop the final view to be used by the Karpel connection.

Dependencies:

1. None



Completion Criteria:

EIS is providing support for the view creation. As such there is no functional project deliverable associated with this item.

Task Inter 13: JMS NIST File Fingerprint Enrollment Interface

Objective: Provide an automated procedure to enroll fingerprint data captured within the WCSO's existing Cogent system and provided to EIS as standard NIST data files. The process will extract the fingerprint image files and enroll the designated fingerprint images to the related inmate booking record.

Task Description:

EIS will develop an automated process that will monitor a network share location for the presence of NIST files. When a NIST file is identified within the designated directory, the interface process will access the file and perform the following actions.

1. Will extract the type 4 fingerprint image files from the NIST file.
2. Will perform a fingerprint enrollment processes on the designated set fingerprint image file by finger position (e.g. right index, left middle, etc.) to generate a biometric template.
3. Identify the inmate based on data contained within the Type 2 portion of the NIST file.
4. Perform the appropriate data update procedure to the inmate's fingerprint profile contained within the JMS.
5. Remove the NIST file from the common share location

An EIS development specification detailing the interface will be provided to the WC for acceptance prior to the commencement of interface programming.

EIS will:

- a) Scope and develop the NIST File import interface
- b) Deploy NIST File import interface.

WC will:

- d) Coordinate access to or provision of the NIST file(s) to the defined access location to be used by the interface process.
- e) Manage responsibilities as enumerated in the general "Interface Task" section of the SOW.
- f) Ensure interface dependencies have been addressed.

Dependencies:

1. WC acceptance of EIS provided interface programming specification.
2. Current Interface specification and sample data files reflecting expected data format and transaction control protocol from WC for NIST Import interface.
1. Network Access to the required transaction/interchange point via the WC Network. Provision of the NIST files by the County to a common file share location.

Completion Criteria:

The interface will be completed when the interface process can retrieve a standard NIST file from the designated file share location, extract the provided fingerprint data, generate a biometric template from the designated image files and utilize the template for matching purposed through the JMS fingerprint validation component.



Software Customization Tasks

All software customizations will be developed and deployed in accordance with the EIS interface specifications accepted by the WC. Interface specifications will be prepared by the EIS development team and submitted to the WC project manager for acceptance. Once accepted, the development interface specification will be the final document and be incorporated into the contract forthwith. In the event a change to the specification is desired following acceptance of the initial development specification, an executed change order will be required. Depending on the nature of the modification requested EIS reserves the right to require additional cost for software customization changes post specification acceptance.

EIS will develop the following agreed upon software customizations as part of this project:

Task SWCZ 1: JMS Dashboard/Display

Objective: Develop or configure 4 custom display forms for the WC that replace the content included in the existing "Dashboard" display application deployed within the jail, including;

- a) Booking dashboard
- b) Sgt's dashboard
- c) Population Manager
- d) Security Unit
- e) WC Records

NOTES:

The 4 current dashboard displays have been developed by Washington County IT staff a deployed within the jail environment, including large screen television displays within the booking/intake environment. The existing dashboards use an automated update capability and refresh the displayed information at regular intervals.

Task Description: Provide development of/ or configuration services to create a reasonable representation of the existing dashboard applications, supporting the 4 display options. The EIS delivered component will be capable of automatically refreshing the displayed information on an agency defined interval, be capable of being displayed in a full screen mode on an external monitor and operating as an independent application outside of the JMS workstation. The final functional processing will be defined within the development specification provided by EIS for WC approval.

Responsibilities

EIS will:

- a) Conduct the application functionality discovery phase of the development by working with WC subject matter expert(s) to identify and document required component functionality.
- b) Create a development specification document detailing the deliverable.
- c) Develop/configure component per approved development specification.
- d) Deploy and test component into production environment.

WC will:

- a) Approve Interface specifications prior to commencement of development work.



- b) Provide subject matter expert(s) with sufficient expertise related to the functional requirements of the existing component. The subject matter expert(s) will work with EIS during the development specification creation and Sign-Off phases.

Dependencies:

- 1. None.

Completion Criteria:

This task is considered complete when the 4 dashboard displays have been deployed to the productions system and are capable of operating in accordance with the approved design specification.

Task SWCZ 2: JMS Auto-populate Related Court Date (1st Appearance)

Objective: Develop system level function associated with the selection of available first appearance court dates within the offense form to limit the date selection to dates when the court is scheduled to be in session. The WC would be able to define within the system differing date schedules for differing courts based on court jurisdiction. (Ref CMS-006)

Task Description: Provide a new system function that will limit the available first appearance court dates within the offense form, based on the specific court, to only those dates when the court is scheduled to be in session. The WC would be able to define within the system differing date schedules for differing courts based on court jurisdiction. Upon designation of the court associated with the offense the system would automatically insert the next available first appearance date based on the courts availability not the first appearance field associated with the charge. The user would be able to modify the first appearance field, however, would only be able to select a date value when the court is anticipated to be in session. The final functional processing will be defined within the development specification provided by EIS for WC approval.

EIS will:

- a) Conduct the application functionality discovery phase of the development by working with WC subject matter expert(s) to identify and document required component functionality.
- b) Create a development specification document detailing the deliverable.
- c) Develop/configure component per approved development specification.
- d) Deploy and test component into production environment.

WC will:

- a) Approve Interface specifications prior to commencement of development work.
- b) Provide subject matter expert(s) with sufficient expertise related to the functional requirements of the existing component. The subject matter expert(s) will work with EIS during the development specification creation and Sign-Off phases.
- c) Maintain a calendar of court dates for each court designation for the system to use to suggest the next court date.

Dependencies:

- 1. None.

Completion Criteria:

This task is considered complete when the agency is able to define the date availability parameters associated with each court per the development specification.



AND

The system appropriately selects the appropriate first appearance date and updates the charge first appearance date value on the offense screen in a manner consistent with the processed defined in the development specification.

Task SWCZ 3: JMS Auto-populate Property Receipt

Objective: Develop system level function that generates and displays a transaction receipt number associated with property intake and release transactions. (Ref CMS-009)

Task Description: Provide a new system function that will generate a sequential receipt transaction identifier associated with inmate property and release transactions in the JMS. The receipt transaction # is intended to provide an event-based tracking identifier associated with an item (or multiple items) custody change transaction and will be applied to all property items affected by the associated transaction. The final functional processing will be defined within the development specification provided by EIS for WC approval.

EIS will:

- a) Conduct the application functionality discovery phase of the development by working with WC subject matter expert(s) to identify and document required component functionality.
- b) Create a development specification document detailing the deliverable.
- c) Develop/configure component per approved development specification.
- d) Deploy and test component into production environment.

WC will:

- a) Approve Interface specifications prior to commencement of development work.
- b) Provide subject matter expert(s) with sufficient expertise related to the functional requirements of the existing component. The subject matter expert(s) will work with EIS during the development specification creation and Sign-Off phases.

Dependencies:

1. None.

Completion Criteria:

This task is considered complete when property receipting modification has been deployed to the WC production server(s) and operates in a manner consistent with the processed defined in the development specification.

Task SWCZ 4: JMS Visitation Max visits over defined period

Objective: Modify the existing visitations scheduling function to evaluate the number of visits completed with the inmate over an agency defined period of time, and to disallow the scheduling of future visits within the time frame if the agency defined # of visits threshold exceeded.

Task Description: Design and implement a change to the current inmate visitation scheduling component intended to prohibit the user from scheduling future visits for an inmate within a specified period of time, if the visit will cause the # of inmate visits for the specified inmate to exceed the maximum number of visits allowed within the specified period of time. The agency will determine a maximum # of personal visits allowed within a specified time period (e.g. 3 per week). EIS will modify the existing visitations scheduling function to enforce the max limit and to



disallow the scheduling of future visits within the time frame. The final functional processing will be defined within the development specification provided by EIS for WC approval.

EIS will:

- a) Conduct the application functionality discovery phase of the development by working with WC subject matter expert(s) to identify and document required component functionality and processing directives.
- b) Create a development specification document detailing the deliverable.
- c) Develop/configure component per approved development specification.
- d) Deploy and test component into production environment.

WC will:

- a) Approve Interface specifications prior to commencement of development work.
- b) Provide subject matter expert(s) with sufficient expertise related to the functional requirements of the existing component. The subject matter expert(s) will work with EIS during the development specification creation and Sign-Off phases.

Dependencies:

1. None.

Completion Criteria:

This task is considered complete when the visitation scheduling component has been deployed to the WC production server(s) and operates in a manner consistent with the processed defined in the development specification.

Task SWCZ 5: Add Windows User JMS Authentication

Objective: Modify the existing JMS logon function to utilize an Active Directory log-on verification.

Task Description: Design and implement a change to the current JMS logon process that will perform a call into the WCSO Active Directory for user authentication and user role association. The system will support an independent configuration option to change the application level logon from the internal JMS security authenticator to a Windows AD integrated authentication. The JMS application will prompt for a username and password and will utilize the information to authenticate against the WCSO's AD domain authentication rather than jail internal jail security module. This will require local IT to coordinate access to that process and allow EIS to use AD authentication. A detailed development specification will be developed, reviewed and mutually approved.

The final functional processing will be defined within the development specification provided by EIS for WC approval.

EIS will:

- a. Conduct the application functionality discovery phase of the development by working with WC subject matter expert(s) to identify and document required component functionality and processing directives.
- b. Create a development specification document detailing the deliverable.
- c. Develop/configure component per approved development specification.
- d. Deploy and test component into production environment.

WC will:

- a. Approve Interface specifications prior to commencement of development work.
- b. Provide subject matter expert(s) with sufficient expertise related to the functional requirements of the existing component. The subject matter expert(s) will work with EIS during the development specification creation and Sign-Off phases.

Dependencies:

1. None.



Completion Criteria:

This task is considered complete when the system log on component has been deployed to the WC production server(s) and operates in a manner consistent with the processes defined in the development specification.



Data Conversion Tasks

The WC currently utilizes multiple applications as part of daily jail operations and has identified 5 sets of data that are maintained by the County related to a combination of historical data storage and current jail operations. The following datasets have been identified.

- a) **Tiburon JMS**– County’s core Jail management system and primary data source for booking, sentencing and release information – (To Be Migrated by EIS to the EIS JMS).
- b) **Tiburon JMS Mugshots**– County’s core set of inmate mugshots stored related to the primary Tiburon JMS system – (To Be Migrated by EIS to the EIS JMS).
- c) **WC PSWEB Application** – PSWEB is a County developed application that provides a collection of law enforcement functions and is utilized by the SO and partner agency for a variety of capabilities. Within the Jail the PSWEB provides a subset of housing management functions and some general inquiry capabilities. The PSWEB application pulls data from the Tiburon database and stores transactional data to a local SQL Database (County Developed). (Select portions of the PSWEB To Be Migrated by EIS to the EIS JMS). Details to be developed and documented in a mutually agreeable data migration specification, however, this is limited to migrating data from this system that has an existing module within the JMS.
- d) **WC Jail Systems**– Jail systems is a specialized tool built by the County to assist users with 1) Release Risk assessments the generation of release agreements, 2) inmate sentencing. (Select portions of the Jail Systems application To Be Migrated by EIS to the EIS JMS). Details to be developed and documented in a mutually agreeable data migration specification, however, this is limited to migrating data from this system that has an existing module within the JMS.
- e) **WC Rehab**– Local inmate programs database provided via MS Access. The Rehab application is utilized to track inmates’ assignments and participation in jail sponsored programs. (Select portions of the Rehab data is to Be Migrated by EIS to the EIS programs system). Details to be developed and documented in a mutually agreeable data migration specification, however, this is limited to migrating data form this system that has an existing module within the JMS.
- f) **Fingerprint Image File Enrollment into Biometric Engine** – Import of and enrollment into the EIS Single Digit Biometric engine of existing set of fingerprint image files provided by the County.

EIS will build several cycles into the JMS installation process to include sample data conversion testing and validation time prior to live operations (minimum of 3 cycles).

EIS will utilize an industry standard data migration methodology, documented in a data conversion plan as accepted by Washington County. The normal EIS implementation cycle provides two or more validation conversions. This gives the WC the opportunity to check the validation for completeness and accuracy before committing to take the system live. It also provides timing data that can be used to finalize the go-live procedures within the WC.

The Data Conversion Plan will contain specific details on data conversion. This enumerates the data to be converted, the conversion and validation steps, a go-live procedure, and any special field mappings that may be required by the WC. Special emphasis is placed on identifying and mitigating any data differences that exist between the new JMS and legacy JMS system.

Normally the first data conversion is done just before deploying the initial system installation for key project personnel. This provides data for training and also gives the WC the opportunity to validate the first pass data



conversion. After the system is installed on site, key project personnel can work with EIS staff to certify the data conversion and correct any problems that have been identified. If necessary, additional test conversions can be done for certification. When the final data conversion test plan and sample data is acceptable to WC, the final go-live process can be scheduled, and the final data conversion will be done during this process.

EIS can only convert data into the new JMS system where useable data is provided by the WC and an appropriate related data element exists in the existing JMS database. Data that cannot be reconciled according to the conversion plan will not be converted. EIS makes no guarantee that all existing data can be converted.

Task DCON 1: EIS Tiburon JMS Data Conversion

Objective: Convert the existing EIS Tiburon JMS data into the new system.

Task Description: Provide data conversion services to existing textural data and update the newly installed JMS system with the historic information contained within the WC's existing JMS system housed in the legacy Tiburon database. Data to be converted includes the booking and inmate data currently housed in the WC's JMS database, as well as the data collections to be identified within the JMS data conversion plan. EIS will load the data provided by the WC, programmatically modify the data to conform to the conversion standards defined by the WC in accordance with the conversion plan and upload the converted data to the operational database on the WC's live JMS database server.

Responsibilities

EIS will:

- a) Conduct the Data Discovery phase of the project by working with WC subject matter expert(s) to complete a data field mapping between the JMS and the existing JMS system.
- b) Develop a control document that describes agreed-upon mapping of data elements and the handling of exceptions.
- c) Develop the conversion code, including both the data extraction routines and the data upload scripts. Where possible perform the data conversion according to the specifications in the control document with data provided by the WC.
- d) A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert may be maintained in a notes field for historical reference.
- e) Verify current JMS database schemas on production servers.
- f) Deliver to WC and upload converted data to the WC designated production server.
- g) Project Manager will assist in the data review with the WC and define Data Acceptance tests.
- h) Perform a final data conversion upon WC's review and approval of the test data conversion.

WC will:

- a) Provide existing Tiburon data in common exchange format including ASCII, pipe-delimited files or in a common database structure (MS SQL Server, etc.) on request by EIS project manager. EIS prefers a standardized SQL .BAK file but can work with County to determine an acceptable format. County will be expected to perform **no less** than 3 full data extractions from the legacy system prior to system cutover.
- b) Provide subject matter expert(s) with sufficient expertise related to the data being converted. The subject matter expert(s) will work with EIS during the Data Review and Sign-Off phases.



- c) Provide conversion database(s) or access to the database to be converted in the EIS specified format.
- d) After completion, any changes to the data must be made by manual data entry by the WC or agree to a Change Order.
- e) Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS system.
- f) Clean up existing databases based on the standard naming conventions agreed to with EIS.
- g) Translate all existing picklists in the existing system to the standards agreed to with EIS.
- h) Review and approve results of test data conversion.
- i) Verify the integrity of the conversion and notify EIS of any conversion errors or anomalies.
- j) Verify specific data collections to assure accuracy of data, including:
 - a. Inmate Sentences and calculated release dates.
 - b. Inmate charge and charge status.
 - c. Inmate Bail
 - d. Inmate alerts
 - e. Inmate housing assignments.

Dependencies:

1. Provision of the JMS data in a common data interchange format (either a SQL .BAK or delimited file) format by the County.
2. WC JMS data specialist to assist with data mapping and validation.
3. WC provided screen shots and output report containing inmate data to assist with conversion mapping.
4. Network Access to the required transaction/interchange point via the WC Network.

Completion Criteria:

This task will be completed upon uploading into the new JMS databases the converted data records from the Department's existing Tiburon JMS system, as outlined in the Data Conversion and External Conversion sections of the EIS developed project plan and verified by WC as defined in the Acceptance test plan.

Task DCON 2: Tiburon Mugshot Data Conversion

Objective: Convert the existing Mugshot image data into the new system.

Task Description: Provide data conversion services to update the newly installed JMS system with the historic mugshot images contained in the legacy Tiburon system. EIS will load the mugshot data provided by the WC, programmatically modify the data to conform to the conversion standards defined by the WC in accordance with the JMS conversion plan and upload the converted mugshot data to the operational database on the WC's live JMS database server.

Responsibilities

EIS will:



- a) Conduct the Data Discovery phase of the project by working with WC subject matter expert(s) to complete analysis and scripting creation required to migrate the image data.
- b) Develop a control document that describes agreed-upon mugshot conversion approach and the handling of exceptions.
- c) Develop the conversion code, including the data upload scripts. Where possible perform the data conversion according to the specifications in the control document with data provided by the WC.
- d) A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert may be maintained in a notes field for historical reference.
- e) Verify current image database schemas on production servers.
- f) Deliver to WC and upload converted data to the WC designated production server.
- g) Project Manager will assist in the data review with the WC and define Data Acceptance tests.
- h) Perform a final data conversion upon WC's review and approval of the test data conversion.

WC will:

- a) Provide subject matter expert(s) with sufficient expertise related to the data being converted. The subject matter expert(s) will work with EIS during the Data Review and Sign-Off phases.
- b) Provide conversion database(s) or access to the database to be converted in the EIS specified format.
- c) Extract data from existing mugshot/JMS system and provide legacy data in common exchange format appropriate for the exchange of image data.
- d) After completion, any changes to the data must be made by manual data entry by the WC or agree to a Change Order.
- e) Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS system.
- f) Review and approve results of test data conversion.
- g) Verify the integrity of the conversion and notify EIS of any conversion errors or anomalies.

Dependencies:

1. Provision of the mugshot data in a common image type data interchange format.
2. WC Jail data specialist to assist with data mapping and validation.
3. WC provided screen shots and output report containing inmate data to assist with conversion mapping.
4. Network Access to the required transaction/interchange point via the WC Network.

Completion Criteria:

This task will be completed upon uploading into the new Jail system the converted image data from the agency's existing mugshot system, as outlined in the Data Conversion and External Conversion sections of the EIS developed project plan and verified by WC as defined in the Acceptance test plan.



Task DCON 3: EIS JMS Data Conversion – PSWEB

Objective: Convert a defined subset of existing PSWEB JMS data into the new system.

Task Description: Provide data conversion services to existing textual data and update the newly installed JMS system with the historic information contained within the WC's existing PSWEB system housed in the WC's PSWEB database. PSWEB is a software application developed by the WC to augment the current jail system and provide a suite of jail modules used by WC staff. Data to be converted includes:

- a. Jail Incident Reports
- b. Suicide Watch
- c. Rounds, events and Security checks
- d. Any additional data collections to be identified within the JMS data conversion plan.

EIS will load the data provided by the WC, programmatically modify the data to conform to the conversion standards defined by the WC in accordance with the conversion plan and upload the converted data to the operational database on the WC's live JMS database server.

Responsibilities

EIS will:

- a) Conduct the Data Discovery phase of the project by working with WC subject matter expert(s) to complete a data field mapping between the JMS and the existing JMS system.
- b) Develop a control document that describes agreed-upon mapping of data elements and the handling of exceptions.
- c) Develop the conversion code, including both the data extraction routines and the data upload scripts. Where possible perform the data conversion according to the specifications in the control document with data provided by the WC.
- d) A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert may be maintained in a notes field for historical reference.
- e) Verify current JMS database schemas on production servers.
- f) Deliver to WC and upload converted data to the WC designated production server.
- g) Project Manager will assist in the data review with the WC and define Data Acceptance tests.
- h) Perform a final data conversion upon WC's review and approval of the test data conversion.

WC will:

- a) Provide existing PSWEB data in common exchange format including ASCII, pipe-delimited files or in a common database structure (MS SQL Server, etc.) on request by EIS project manager. EIS prefers a standardized SQL .BAK file but can work with County to determine an acceptable format. County will be expected to perform **no less** than 3 full data extractions from the legacy system prior to system cutover.
- b) Provide subject matter expert(s) with sufficient expertise related to the data being converted. The subject matter expert(s) will work with EIS during the Data Review and Sign-Off phases.
- c) Provide conversion database(s) or access to the database to be converted in the EIS specified format.
- d) After completion, any changes to the data must be made by manual data entry by the WC or agree to a Change Order.



- e) Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS system.
- f) Clean up existing databases based on the standard naming conventions agreed to with EIS.
- g) Translate all existing picklists in the existing system to the standards agreed to with EIS.
- h) Review and approve results of test data conversion.
- i) Verify the integrity of the conversion and notify EIS of any conversion errors or anomalies.
- j) Verify specific data collections to assure accuracy of data, including:
 - a. Jail Incidents
 - b. Suicide Watch
 - c. Rounds, events and security checks

Dependencies:

1. Provision of the PSWEB data in a common data interchange format (either a SQL .BAK or delimited file) format by the County.
2. WC JMS data specialist to assist with data mapping and validation.
3. WC provided screen shots and output report containing inmate data to assist with conversion mapping.
4. Network Access to the required transaction/interchange point via the WC Network.

Completion Criteria:

This task will be completed upon uploading into the new JMS databases the converted data records from the WC's existing PS.WEB system, as outlined in the Data Conversion and External Conversion sections of the EIS developed project plan and verified by WC as defined in the Acceptance test plan.

Task DCON 4: EIS JMS Data Conversion – Jail Systems

Objective: Convert a defined subset of existing Jail Systems JMS data into the new system.

Task Description: Provide data conversion services to existing textual data and update the newly installed JMS system with the historic information contained within the WC's existing Jail Systems system housed in the WC's Jail Systems SQL Server database. Jail Systems is a software application developed by the WC to augment the current jail system and provide a suite of jail modules used by WC staff. Data to be converted includes:

- a. Release Risk Assessments
- b. Dress In record
- c. Sentence Calculations
- d. Property Receipt
- e. Release Agreements

EIS will load the data provided by the WC, programmatically modify the data to conform to the conversion standards defined by the WC in accordance with the conversion plan and upload the converted data to the operational database on the WC's live JMS database server.

Note: The Jail Systems application is utilized largely as a forms generation with integration to the existing Tiburon system, and it is unclear as to the volume or context of data stored directly within the Jail Systems database.



Responsibilities

EIS will:

- a) Conduct the Data Discovery phase of the project by working with WC subject matter expert(s) to complete a data field mapping between the JMS and the existing JMS system.
- b) Develop a control document that describes agreed-upon mapping of data elements and the handling of exceptions.
- c) Develop the conversion code, including both the data extraction routines and the data upload scripts. Where possible perform the data conversion according to the specifications in the control document with data provided by the WC.
- d) A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert may be maintained in a notes field for historical reference.
- e) Verify current JMS database schemas on production servers.
- f) Deliver to WC and upload converted data to the WC designated production server.
- g) Project Manager will assist in the data review with the WC and define Data Acceptance tests.
- h) Perform a final data conversion upon WC's review and approval of the test data conversion.

WC will:

- a) Provide existing Jail Systems data in common exchange format including ASCII, pipe-delimited files or in a common database structure (MS SQL Server, etc.) on request by EIS project manager. EIS prefers a standardized SQL .BAK file but can work with County to determine an acceptable format. County will be expected to perform **no less** than 3 full data extractions from the legacy system prior to system cutover.
- b) Provide subject matter expert(s) with sufficient expertise related to the data being converted. The subject matter expert(s) will work with EIS during the Data Review and Sign-Off phases.
- c) Provide conversion database(s) or access to the database to be converted in the EIS specified format.
- d) After completion, any changes to the data must be made by manual data entry by the WC or agree to a Change Order.
- e) Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS system.
- f) Clean up existing databases based on the standard naming conventions agreed to with EIS.
- g) Translate all existing picklists in the existing system to the standards agreed to with EIS.
- h) Review and approve results of test data conversion.
- i) Verify the integrity of the conversion and notify EIS of any conversion errors or anomalies.
- j) Verify specific data collections to assure accuracy of data, including:
 - a. Inmate Sentence Calculations
 - b. Inmate Release Risk Assessments
 - c. Inmate Dress-In Records
 - d. Property Receipt
 - e. Release Agreements



Dependencies:

1. Provision of the Jail Systems data in a common data interchange format (either a SQL .BAK or delimited file) format by the County.
2. WC JMS data specialist to assist with data mapping and validation.
3. WC provided screen shots and output report containing inmate data to assist with conversion mapping.
4. Network Access to the required transaction/interchange point via the WC Network.

Completion Criteria:

This task will be completed upon uploading into the new JMS databases the converted data records from the WC's existing Jail Systems application, as outlined in the Data Conversion and External Conversion sections of the EIS developed project plan and verified by WC as defined in the Acceptance test plan.

Task DCON 5: EIS JMS Data Conversion – Rehab

Objective: Convert a defined subset of existing Rehab programs data into the new system.

Task Description: Provide data conversion services to existing textual data and update the newly installed JMS system with the historic information contained within the WC's existing Rehab Inmate Programs system housed in the WC's Jail Systems SQL Server database. Jail Systems is a software application developed by the WC to augment the current jail system and provide a suite of jail modules used by WC staff. Data to be converted includes:

- a. Inmate Programs – Historical Participation

EIS will load the data provided by the WC, programmatically modify the data to conform to the conversion standards defined by the WC in accordance with the conversion plan and upload the converted data to the operational database on the WC's live JMS database server.

Note: The Jail Systems application is utilized largely as a standalone application to track the inmate's participation in WC provided educational programs. Since the Rehab application is fully standalone (a direct linkages to the operational Tiburon data is unknown) it is unclear as to the consistency of data contained within the application and the ability to effectively associate Rehab data with primary jail data.

Responsibilities

EIS will:

- a) Conduct the Data Discovery phase of the project by working with WC subject matter expert(s) to complete a data field mapping between the JMS and the existing JMS system.
- b) Develop a control document that describes agreed-upon mapping of data elements and the handling of exceptions.
- c) Develop the conversion code, including both the data extraction routines and the data upload scripts. Where possible perform the data conversion according to the specifications in the control document with data provided by the WC.
- d) A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert may be maintained in a notes field for historical reference.
- e) Verify current JMS database schemas on production servers.
- f) Deliver to WC and upload converted data to the WC designated production server.



- g) Project Manager will assist in the data review with the WC and define Data Acceptance tests.
- h) Perform a final data conversion upon WC's review and approval of the test data conversion.

WC will:

- a) Provide existing Rehab data in common exchange format including ASCII, pipe-delimited files or in a common database structure (MS SQL Server, etc.) on request by EIS project manager. EIS prefers a standardized SQL .BAK file but can work with County to determine an acceptable format. County will be expected to perform **no less** than 2 full data extractions from the legacy system prior to system cutover.
- b) Provide subject matter expert(s) with sufficient expertise related to the data being converted. The subject matter expert(s) will work with EIS during the Data Review and Sign-Off phases.
- c) Provide conversion database(s) or access to the database to be converted in the EIS specified format.
- d) After completion, any changes to the data must be made by manual data entry by the WC or agree to a Change Order.
- e) Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS system.
- f) Clean up existing databases based on the standard naming conventions agreed to with EIS.
- g) Translate all existing picklists in the existing system to the standards agreed to with EIS.
- h) Review and approve results of test data conversion.
- i) Verify the integrity of the conversion and notify EIS of any conversion errors or anomalies.
- j) Verify specific data collections to assure accuracy of data, including:
 - a. Inmate Programs – Historical participation records

Dependencies:

1. Provision of the Rehab data in a common data interchange format (either a SQL .BAK or delimited file) format by the County.
2. WC JMS data specialist to assist with data mapping and validation.
3. WC provided screen shots and output report containing inmate data to assist with conversion mapping.
4. Network Access to the required transaction/interchange point via the WC Network.

Completion Criteria:

This task will be completed upon uploading into the new JMS databases the converted data records from the WC's existing Rehab application, as outlined in the Data Conversion and External Conversion sections of the EIS developed project plan and verified by WC as defined in the Acceptance test plan.

Task DCON 6: Enrollment of existing inmate fingerprint image files

Objective: Attempt import and enroll the existing set of inmate fingerprint images for use within the EIS biometric engine from agency provided NIST Files.

Task Description: Provide data conversion services to existing fingerprint image data provided by the County. The intent of this conversion service is to programmatically load the WC's existing set of inmate fingerprint records into the JMS Biometric engine for use as part of the inmate biometric verification. The import process involves the



loading of the fingerprint image file and the enrollment of the fingering file into the biometric engine. The enrollment process generates a fingerprint template that will be used as the basis for matching. For each single fingerprint image file provided, the import process will attempt to open the fingerprint image file, perform a single digit enrollment, locate the inmate's record within the converted JMS data (by booking # or Inmate ID), and create a template entry in the EIS JMS biometric engine data set. Data to be converted includes the fingerprint image file(s) associated with each inmate booking event to be identified within the JMS Fingerprint data conversion plan. EIS will load the data provided by the WC, programmatically modify the data to conform to the conversion standards defined in accordance with the conversion plan. Images files that cannot be read or have no identifiable link to a historic inmate record will be discarded. If third-party image conversion tools/software is required to complete the conversion, the required tools will be provided by the County.

Responsibilities

EIS will:

- a) Conduct the Data Discovery phase of the project by working with WC subject matter expert(s) to review the fingerprint image and attribute data formats.
- b) Develop a control document that describes agreed-upon mapping of data elements and the handling of exceptions.
- c) Develop the conversion code, including both the data load and image enrollment scripts. Where possible perform the data conversion according to the specifications in the control document with data provided by the WC.
- d) A conversion is moving data from one system to another according to the data type mapping and directives. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert may be maintained in a notes field for historical reference.
- e) Verify current JMS database schemas on production servers.
- f) Deliver to WC and upload converted data to the WC designated production server.
- g) Project Manager will assist in the data review with the WC and define Data Acceptance tests.
- h) Perform a final data conversion upon WC's review and approval of the test data conversion.

WC will:

- a) Provide the fingerprint data in a common data interchange format sufficient to read the fingerprint image as an industry standard image file format. Each fingerprint image will need to be provided as a separate image file, and include (at minimum) the following attribute data:
 - a. Inmate ID
 - b. Booking ID
 - c. Finger hand (Can be NIST position code value)
 - d. Finger position (Can be NIST position code value)
 - e. Date of image capture
- b) Provide subject matter expert(s) with sufficient expertise related to the data being converted. The subject matter expert(s) will work with EIS during the Data Review and Sign-Off phases.
- c) After completion, any changes to the data must be made by manual data entry by the WC or agree to a Change Order.
- d) Provide a set of control fingerprint files to test the enrollment efficacy.
- e) Review and approve results of test data conversion.
- f) Verify the integrity of the conversion and notify EIS of any conversion errors or anomalies.



Dependencies:

5. Provision of the fingerprint data in a common data interchange format sufficient to read the fingerprint image in a standard file format. Each fingerprint image will need to be provided as a separate image file, and include (at minimum) the following attribute data:
 - a. Inmate ID
 - b. Booking ID
 - c. Finger hand (Can be NIST position code value)
 - d. Finger position (Can be NIST position code value)
 - e. Date of image capture
6. Image must be provided as a standard, non-proprietary image file. County will be responsible to convert images to readable format.
7. Network Access to the required transaction/interchange point via the WC Network.

Completion Criteria:

This task will be completed upon uploading into the new JMS databases the loaded and enrolled fingerprint data records from the data set provided by the county, as outlined in the Data Conversion and External Conversion sections of the EIS developed project plan and verified by WC as defined in the Acceptance test plan. If data cannot be provided by the County in suitable format to support conversion/enrollment, this deliverable will be removed from the project, and any fees associated with the conversion services will be credited to the project.



User Training and Live Operations

Note: EIS personnel will operate on-site at the WC to conduct user training and take the proposed system live.

User Training

Task TRN 1: JMS Administrator Training

Objective: Provide on-site training services in accordance with purchased training services for system administration personnel. Conduct JMS technical and administrative training and supply related system administrative materials as described in the Training Plan. Provide JMS and supporting systems - System Administrator Training.

Note: The administrator training will be performed during the JMS configuration workshop.

Task Description:

EIS will provide training services and assist WC administrative staff in the configuration and maintenance of the JMS, application configurations and entry of WC-specific information such as code tables, users, system permissioning, etc. along with functional use on the operation and support of the installed JMS system and supporting subsystems

Jail Administration: This course covers use of several supervisory programs; including MNI maintenance, Inmate PIN management, Housing Location Maintenance, Security Maintenance, and Table Maintenance along with specialized reporting function including SSA, SCAAP.

Topics covered include: Maintaining the master inmate identifier, maintaining code tables, maintaining security and program, Configuring and authorizing personnel to use the State Switch permissions.

2 – 8 Hour training classes

Responsibilities:

EIS will:

- a) Provide standard training sessions for WC administrative personnel on the configuration of JMS databases and entry of WC-specific data.

WC will:

- a) Determine a primary and minimum of one (1) backup system administrator to receive administrative training.
- b) Develop and enter all WC-specific input data that is to be entered manually.
- c) Be responsible for the accuracy and completeness of the data provided and entered.
- d) Ensure the participation of the appropriate personnel in the training session, and general user training.

Completion Criteria:

This task will be completed once on-site training classes for both WC staff and WC-selected end-users have been conducted, as specified on the training plan detailing the training classes and the training class durations, and



when EIS training staff has trained the WC administrator on procedures for configuring the JMS databases and entering WC-specific data.

Task TRN 2: JMS Technical and User Training

Objective: Provide on-site training services in accordance with purchased training services as specified in the implementation schedule to an estimated 180 JMS system users over 12 classes.

Task Description:

EIS will conduct standard and specialized training courses as detailed in the implementation plan to provide training services and materials to designated WC personnel on the use of the JMS system, subsystems or other designated components, as described. Training services have been structured to accommodate between 18 and 20 users per class at a WC provided training facility.

Jail User: This is a “hands-on” training course for personnel that will be required to access information and entering data into the PS.NET JMS system. The course covers all the key modules included in the Jail Management Program, but most time is spent on the core booking, housing and release elements of the module. This class provides a working overview, and agency specific guidelines for the appropriate use of the JMS.

Topics covered include: Logging on and starting the program, Program navigation, Use of Code Tables and help facilities, Inmate searching and record reconciliation, booking activities including inmate identification, arrest information, charge management, housing, movement and classifications. Specific emphasis on data access and forms. Description of data fields and forms, Saving data and Best Operating Practices.

12 – 8 hour classes.

Responsibilities:

EIS will:

- a) Provide standard training sessions for WC technical and end user personnel on the operations of the JMS system as specified in the implementation plan.
- b) Training is structured to the requirements of the WC. EIS is flexible on course hours, times, days, etc. Courses may be given multiple times to accommodate shift and other scheduling requirements. Scheduling will be developed by WC and EIS.
- c) Provides training manuals and any other materials required for the training in electronic format.
- d) Provide knowledgeable training staff to conduct classes

WC will:

- a) Designation of a training coordinator that will work with the EIS project manager to schedule training at the WC. The training coordinator will be responsible to ensure that WC personnel are available, and relieved of routine duties, during scheduled training sessions.
- b) Make arrangements and assignments for all required personnel to attend EIS training with their appropriate functional group. Ensure the participation of the appropriate personnel in the training session, and general user training.
- c) Provide data entry policies and procedures for each functional group.
- d) Follow up with any training attendees who may need extra help and assistance in order to grasp needed concepts.



- e) Ensure system administrative personnel attend and is available during each scheduled training session to answer policy questions.
- f) Provide a dedicated training area that can comfortably accommodate the scheduled classes. This classroom must accommodate individual workstations for each student. Training is generally done on the customer's site using the actual operational system. Training area must also accommodate an overhead projector, projector screen/whiteboard, and include workspace in the back of the room for EIS Personnel.

Completion Criteria:

This task will be completed once on-site training classes for both WC staff and WC-selected end-users have been conducted as specified on the implementation plan.



Cutover to Live Operations

Task GL 1: Jail Production Cutover

Objective: Complete final data conversion and cut over to live operation of the JMS system.

Task Description:

Upon completion of the user training, EIS will conduct a final data conversion and take the JMS system live. EIS personnel will remain on site to assist users with the new system and respond to any issues discovered with the live system. Final data conversion and cutover generally takes 24-72 hours. A data conversion and cutover plan will be included in the Project Plan. Support services period for the system will commence on the go-live date.

Responsibilities:

EIS will:

- a. Complete a final data conversion.
- b. Assist the WC to verify the final converted data.
- c. Assist the WC staff in placing JMS into a production status.
- d. Initiate system interfaces as required.
- e. Provide ON-SITE start-up support resources and go-live assistance by EIS technical staff for up to seven (7) calendar days post cutover to monitor the subsystem and to respond to issues identified.
- f. Monitor the initial operation of JMS and answer any operational questions raised by the WC.
- g. Provide start-up support and any required go-live assistance.

WC will:

- a. Place the software into production and begin operational use in consultation with EIS and in accordance with the Project Schedule.
- b. Ensure appropriate WC staff are available as required to support transition.
- c. Coordinate with third party vendors as required for interface transition.

Completion Criteria:

This task will be completed once the final data conversion is completed and verified and the JMS system taken live.

Dependencies:

1. Receipt of formal acceptance from WC Project Manager with authorization to proceed to system "Go-Live".
2. Completion of end-user training.

Completion Criteria:

This task is considered complete when JMS is placed into production operation.



Project Completion and Sign Off

Task COM 1: JMS Final Acceptance

Objective: Complete post go-live final system acceptance with the following tasks associated with the final acceptance milestones.

Task Description:

Perform a series of acceptance tasks based on the following time periods.

1. Within 3 days of system “Go-Live”, EIS will certify completion of the JMS system installation in writing to the County.
2. Upon receipt of the installation certification (task (a)), EIS and WC project managers will ensure that all work per this Statement of Work, and any project change orders, has been completed and will acknowledge go-live acceptance of the system in accordance with the Acceptance Plan.

Completion Criteria:

This task is considered complete when the system acceptance criterion, as described in the Acceptance Plan, has been met and final system acceptance has been acknowledged in writing by the County.



IN WITNESS WHEREOF, the parties hereto, having read this SOW in its entirety, do agree thereto in each and every particular.

Approved
EIS

Approved
Washington County

By: _____

By: _____

Signature

Signature

Print or Type Name

Print or Type Name

EIS Project Manager _____

Title

Date

Title

Date

ATTACHMENT B

Modifications to Standard Contract Terms and Conditions

Contractor and County agree to modify specific terms of the Washington County Standard Contract Terms and Conditions as provided below:

1. Section 11 Termination:
 - a. Section 11.1c is hereby amended by replacing the words “seven calendar days” with “thirty calendar days”.
 - b. Section 11.7 is hereby deleted.
2. Section 12 Time is of the Essence: Section 12 is hereby deleted.
3. Section 21 Records:
 - a. The third sentence of Section 21 is hereby amended to add the words “at County’s sole cost and expense and upon ten (10) business days prior written notice” to the end of the sentence.
 - b. The fourth sentence from Section 21 that reads, “In addition, Contractor shall permit authorized representatives of the County to perform site reviews for all Services Delivered by Contractor” is hereby deleted.
4. Section 22 Work Product: Section 22 is hereby deleted.
5. Section 29 Security of Information: The second sentence of Section 29.1 is hereby replaced with the following: “Any Contractor of the County who becomes aware of any breach of a document or electronic file containing personal information of client of the County will notify the Contract Administrator within a reasonable period of time after discovering such breach of security, who will work with the County Public Information Officer to notify the affected persons unless such notice is not required under ORS 646A.604 or other applicable law”.
6. Intergovernmental State Cooperative Purchasing. EIS agrees to extend the terms, conditions and prices of this contract to in support of intergovernmental Cooperative Procurement provisions in accordance with ORS 279A.200 to 279A.225 inclusive.

ATTACHMENT C

Modifications to Standard Insurance Requirements

Contractor and County agree to modify the Standard Insurance Requirements set out in Section 25 of the Washington County Standard Contract Terms and Conditions as provided below:

1. Section 25 of the Standard Contract Terms and Conditions is hereby replaced with the following provision:

“25. **Insurance.** Contractor shall provide insurance coverage and limits as described below. The Commercial General Liability insurance and Automobile Liability insurance carried by Contractor in the United States must be primary to and non-contributory with any insurance, including any self-insurance or retentions carried by the County. A waiver of subrogation in favor of the County shall be required on General Liability, Workers Compensation and Automobile Liability coverage.

25.1 **Workers' Compensation Insurance.** Contractor shall comply with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers. No Workers' Compensation Insurance has been or will be obtained by the County for Contractor or Contractor's employees and subcontractors. Contractor shall provide and maintain workers' compensation coverage for its employees, officers, agents or partners as required by applicable workers' compensation laws including employers' liability with limits not less than \$500,000/ \$500,000/ \$500,000.

25.2 **Commercial General Liability Insurance.** Contractor shall at all times carry a Commercial General Liability insurance policy for at least \$1,000,000 combined single limit per occurrence and \$2,000,000 in the aggregate, for Bodily Injury, Property Damage, and Personal Injury. This insurance shall include contractual liability coverage for the indemnity provided under this contract.

25.3 **Automobile Liability Insurance.** Contractor shall at all times carry Automobile Liability Insurance in the amount of \$1,000,000 combined single limit per accident for Bodily Injury and Property Damage for Contractor's vehicles, whether owned, hired, or non-owned, which includes coverage for Washington County, its agents, officers, elected officials and employees.

25.4 **Technology Errors and Omissions Insurance.** Contractor shall at all times carry a Technology Errors and Omissions type insurance policy with limits of not less than \$1,000,000 per claim and \$1,000,000 in the annual aggregate.

25.5 **Extended Reporting Coverage ("Tail Coverage").** For Technology Errors & Omissions Insurance written on a "claims made" basis and for any other required liability insurance provided on a "claims made" basis, Contractor shall provide "tail" coverage at the completion of the contract for a duration of twenty-four months or continuous "claims made" liability coverage provided for twenty-four months following contract completion. Continuous "claims made" coverage will be acceptable in lieu of "tail"

coverage provided the retroactive date of the coverage is on or before the effective date of this contract.

- 25.6 **Maximum Deductible/Retention.** Any deductible or retention must be disclosed on the certificate of insurance and no deductible or retention may exceed \$500,000 without the prior written consent of the County. Contractor is responsible to pay any amounts within the deductible or retention amount.
- 25.7 **Additional Insureds.** The County, its agents, officers, elected officials and employees must be named as additional insureds under Contractor's Commercial General Liability insurance and Automobile Liability insurance with respect to Contractor's services to be provided under this Contract. The Commercial General Liability and Automobile Liability insurance policies, with the exception of professional and/or workers compensation policies, must be endorsed to show this additional coverage.
- 25.8 **Insurance Certificates.** Contractor shall deliver to the County, prior to the commencement of the work, a certificate of insurance evidencing all policies required by this contract including additional insured provisions afforded by the policy. This requirement can be satisfied by providing a copy of the coverage form and/or the endorsement(s). Further, it is an affirmative obligation upon the Contractor to advise the Contract Administrator within two business days of any substantive change of any insurance policy or endorsement set out herein, and failure to do so shall be construed to be a breach of this contract.
- 25.9 **Subcontractor Insurance.** Contractor shall require and verify that all of its subcontractors of any tier provide insurance coverage and limits identical to the insurance required of the Contractor under this contract, unless this requirement is expressly modified or waived by the County.
- 25.10 **Network Operations Security Liability/Data Breach Insurance.** Contractor shall at all times carry a Data Breach type insurance policy with limits of not less than \$1,000,000 per claim and \$1,000,000 in the annual aggregate. Data Breach Fund liability shall be not less than \$ 200,000.



Executive Information Services, Inc. 1396 NE 20th Ave. Suite 100 - Ocala - FL - 34470 - Phone: (856) 701-6107

PRICING PROPOSAL

Agency: **Washington County, OR Sheriff's Office**
 Address: **155 N First Ave., MS 28**
 Address: **Hillsboro, OR 97124**
 Contact: **Suzi Fulcher (Suzi_Fulcher@co.washington.or.us)**
 Telephone: **(503) 846-8734**

Proposal Number: **19000142 Rev 4**
 Proposal Modification Date: **Jan 7, 2020**
 Proposal Expiration Date: **Dec 31, 2019**
 Prepared By: **A. Missler/C. Hussey**
 Cust. Con.:

PS.NET System Components

| | <u>Software Licensing</u> | <u>Services</u> | <u>1st Y Support</u> |
|--|---------------------------|---------------------|----------------------|
| Jail Management Software | \$297,000.00 | | \$44,550.00 |
| Jail Management Interface | \$76,120.00 | | \$11,418.00 |
| Jail Management Advanced Imaging Module | \$9,600.00 | | \$1,440.00 |
| M2 Message Switch | \$23,250.00 | | \$3,487.50 |
| Media Streaming Services | \$22,000.00 | | \$3,300.00 |
| JMS Biometric Engine W/ Single Digit Finger | \$29,000.00 | | \$4,350.00 |
| Jail Management Wireless JMS Module | \$22,000.00 | | \$3,300.00 |
| Installation & Training Services | | \$210,200.00 | |
| Data Conversion - Estimate Tiburon & County Data | | \$80,000.00 | |
| Data Conversion - Cogent Fingerprint Data | | \$16,000.00 | |
| Training/Test Instance Maintenance & Support | | | \$18,000.00 |
| | \$478,970.00 | \$306,200.00 | \$89,845.50 |
| | SUB-TOTAL | \$785,170.00 | |
| | TOTAL | \$785,170.00 | \$89,845.50 |



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Cust. Con.:

PS.NET System Components

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> | |
|---------------|--------------------------|-------------------|-----------------|-----------------|----------------------|--------------------|
| JMSSVD | JMS Application Software | \$269,000.00 | 1 | \$269,000.00 | \$40,350.00 | |
| JMSASP | JMS Viewer | Included | | | | |
| JMSPREBOOK | JMS Pre-Booking | \$28,000.00 | 1 | \$28,000.00 | \$4,200.00 | |
| JMSPROG | JMS Programs Module | Included | | | | |
| | | | | JMS Base | \$297,000.00 | \$44,550.00 |

Jail Management Interface

| | | | | | | |
|-----------|--|-------------|---|----------------------|--------------------|--------------------|
| JMSLVS | JMS LiveScan Interface (Cogent export) | \$7,000.00 | 1 | \$7,000.00 | \$1,050.00 | |
| | JMS LiveScan Interface (Cogent import) | \$8,000.00 | 1 | \$8,000.00 | \$1,200.00 | |
| JMSCOM | JMS Inmate Phone Initiation Interface (GTL/Telemate) | \$7,000.00 | 1 | \$7,000.00 | \$1,050.00 | |
| JMSKEF | JMS Inmate Commissary Interface (Keefe) | \$7,000.00 | 1 | \$7,000.00 | \$1,050.00 | |
| JMSEMR | JMS Inmate EMR (NaphCare/Techcare export) | \$7,000.00 | 1 | \$7,000.00 | \$1,050.00 | |
| | JMS Inmate EMR (NaphCare/Techcare import) | \$9,000.00 | 1 | \$9,000.00 | \$1,350.00 | |
| TXT2DE | JMS DL Scan Import | \$6,000.00 | 1 | \$6,000.00 | \$900.00 | |
| TXT2DT | - WA State DL Template | \$2,400.00 | 1 | \$2,400.00 | \$360.00 | |
| TXT2DT | - OR State DL Template | \$2,400.00 | 1 | \$2,400.00 | \$360.00 | |
| | SCAAP reporting Interface | Included | | | | |
| | SSA Report Interface | Included | | | | |
| | VINES - Provided directly by Apriss - NC EIS | Included | | | | |
| M2ORLJMSA | ORLEDS Integration Adapter JMS* | Included | | | \$0.00 | |
| SRVH11 | PBK Karpel Export View | \$3,520.00 | 1 | \$3,520.00 | \$528.00 | |
| | JMS NIST File Import & Enrollment | \$16,800.00 | 1 | \$16,800.00 | \$2,520.00 | |
| | | | | JMS Interface | \$76,120.00 | \$11,418.00 |

* Required M2 Switch with OR State interface

M2 Message Switch

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> | |
|---------------|---|-------------------|-----------------|-----------------------|----------------------|-------------------|
| MATX- | M2 Data Switch - | \$15,250.00 | 1 | \$15,250.00 | \$2,287.50 | |
| ORLEDSQ | ORLEDS Inquiry Adapter (Includes 6 Standard Keys) | \$8,000.00 | 1 | \$8,000.00 | \$1,200.00 | |
| | | | | Message Switch | \$23,250.00 | \$3,487.50 |

Jail Management Advanced Imaging Module

| | | | | | | |
|---------|--------------------------|------------|---|---------------------------|-------------------|-------------------|
| JMSEMUG | Enhanced Mugshot Capture | \$9,600.00 | 1 | \$9,600.00 | \$1,440.00 | |
| | | | | Imaging Components | \$9,600.00 | \$1,440.00 |

Media Streaming Services

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | <u>Support - Std</u> |
|---------------|---------------------------------|-------------------|-----------------|--------------|----------------------|
| RMSSMS | Streaming Media Server Software | \$22,000.00 | 1 | \$22,000.00 | \$3,300.00 |
| MSBTS | Media Service Encoder | Included | | N/A | |



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Prepared By: **A. Missler/C. Hussey**

Telephone: **(503) 846-8734**

Cust. Con.:

| | | |
|-----------------------|--------------------|-------------------|
| Media Services | \$22,000.00 | \$3,300.00 |
|-----------------------|--------------------|-------------------|

Biometric Services

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | Support - Std | |
|---------------|----------------------------------|--|-----------------|-------------------------|----------------------|-------------------|
| BFINGER | Fingerprint Verification Engine* | \$29,000.00 | 1 | \$29,000.00 | \$4,350.00 | |
| BIOENGSRV | Biometric Engine Server | Included with items "BFINGER" or "BFACE" | | | | |
| | | | | Biometric Server | \$29,000.00 | \$4,350.00 |

Jail Management Wireless JMS Module

| <u>Part #</u> | <u>Description</u> | <u>Investment</u> | <u>Quantity</u> | <u>TOTAL</u> | Support - Std | |
|---------------|--------------------|-------------------|-----------------|--------------------------------------|----------------------|--------------------|
| JMSWLHS | PocketJMS Software | \$22,000.00 | 1 | \$22,000.00 | \$3,300.00 | |
| *** | | | | | | |
| | | | | Wireless Software Components | \$22,000.00 | \$3,300.00 |
| | | | | Estimated Jail Software Total | \$427,970.00 | \$64,195.50 |



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Cust. Con.:

Professional Services

Project Services - Installation

| <u>Part #</u> | <u>Description</u> | <u>Service Fee</u> | <u>Units</u> | <u>Total</u> |
|------------------------------------|--|--------------------|--------------|---------------------|
| SRVH1 | Project Management & Coordination Services | \$100.00 | 440 | \$44,000.00 |
| SRVH2 | Technical Services | \$160.00 | 188 | \$30,080.00 |
| SRVH7 | On-Site Installation | \$120.00 | 156 | \$18,720.00 |
| SRVH4 | Documentation & Reporting Services | \$90.00 | 120 | \$10,800.00 |
| SRVH5 | System Configuration Services | \$120.00 | 356 | \$42,720.00 |
| SRVH9 | Test/Training Instance Installation | \$180.00 | 80 | \$14,400.00 |
| Installation Services Total | | | | \$160,720.00 |

Project Services - Training

| <u>Part #</u> | <u>Description</u> | <u>Service Fee</u> | <u>Units</u> | <u>Total</u> |
|--------------------------------|-----------------------------|--------------------|--------------|--------------------|
| SRVH8 | JMS Administration Training | \$1,200.00 | 2 | \$2,400.00 |
| SRVH9 | JMS User Training | \$1,200.00 | 12 | \$14,400.00 |
| Training Services Total | | | | \$16,800.00 |

Project Expenses

| | | | | |
|--|-------------------|--|--|---------------------|
| SRV5 | Travel & Per Diem | | | \$32,680.00 |
| Install & Training Expenses Total | | | | \$32,680.00 |
| Installation and Training Total | | | | \$210,200.00 |

| Training Calculation | | | |
|-----------------------------|--------------|-------------------|----------------|
| Application | Users | Class Size | Classes |
| JMS | 190 | 16 | 12 |



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| Telephone: (503) 846-8734 | Cust. Con.: |

Data Conversion - Estimate Tiburon & County Data

Any preliminary pricing included in this proposal is merely provided as an estimate of possible cost and to provide your agency with any overview of how EIS conducts data conversion development. Detailed information, including a sample of your data output is required regarding your project and database to determine a firm, fixed cost proposal.

| | | |
|-------|--|---------------|
| SRVH5 | Data Conversion - Tiburon JMS & Mugshot data | 38,000 |
| SRVH5 | Data Conversion - PSWEB | 16,000 |
| SRVH5 | Data Conversion - Jail Systems | 13,000 |
| SRVH5 | Data Conversion - Rehab | 13,000 |
| | Conversion Services Total | 80,000 |
| SRVH5 | Data Conversion Services provided at standard rate of \$160.00/hour USD. | |

** Anticipated conversion data from existing system Assuming standard Tiburon system

EIS Responsibilities

- a. Conduct the Data Discovery phase of the project by working with Customer subject matter expert(s) to complete a data field mapping.
- b. Develop the conversion code.
- c. A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert will still be kept in a notes field for historical reference.
- d. Provide to the Customer example conversion data in the form of a useable EIS/PS.NET database.
- e. Project Manager will assist in the data review with the Customer and define Data Acceptance tests.
- f. Redevelop the conversion code as specified by change request during the Review and Sign-Off phase.

Agency Responsibilities

- a. Provide conversion database(s) to EIS as mutually agreed.
- b. Provide subject matter expert(s) who know the data being converted. The subject matter expert(s) will work with EIS during the Data Discovery and Review and Sign-Off phases.
- c. Review the example conversion data and provide change requests or sign-off within ten (10) business days.
- d. After completion, any changes to the data must be made by manual data entry by the Customer or agree to a Change Order.
- e. Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS PS.NET system.
- f. Provide final Customer conversion database(s) and the current PS.NET for the final conversion run.



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Proposal Expiration Date: **Dec 31, 2019**

Prepared By: **A. Missler/C. Hussey**

Cust. Con.:

Data Conversion - Cogent Fingerprint Data

Any preliminary pricing included in this proposal is merely provided as an estimate of possible cost and to provide your agency with any overview of how EIS conducts data conversion development. Detailed information, including a sample of your data output is required regarding your project and database to determine a firm, fixed cost proposal.

| | | |
|-------|--|---------------|
| SRVH5 | Data Conversion - Cogent Data Migration and Enrollment | 16,000 |
| | Conversion Services Total | 16,000 |

SRVH5 Data Conversion Services provided at standard rate of \$160.00/hour USD.

**Anticipated conversion data from existing system assuming fingerprints can be delivered as standard image files with sufficient metadata

EIS Responsibilities

- a. Conduct the Data Discovery phase of the project by working with Customer subject matter expert(s) to complete a data field mapping.
- b. Develop the conversion code.
- c. A conversion is moving data from one system to another according to the data field mapping. EIS is not responsible for scrubbing or modifying data from the original system. Any data that does not programmatically convert will still be kept in a notes field for historical reference.
- d. Provide to the Customer example conversion data in the form of a useable EIS/PS.NET database.
- e. Project Manager will assist in the data review with the Customer and define Data Acceptance tests.
- f. Redevelop the conversion code as specified by change request during the Review and Sign-Off phase.

Agency Responsibilities

- a. Provide conversion database(s) to EIS as mutually agreed.
- b. Provide subject matter expert(s) who know the data being converted. The subject matter expert(s) will work with EIS during the Data Discovery and Review and Sign-Off phases.
- c. Review the example conversion data and provide change requests or sign-off within ten (10) business days.
- d. After completion, any changes to the data must be made by manual data entry by the Customer or agree to a Change Order.
- e. Understand that the Customer owns the data. The data being converted will only be modified to fit the format of the EIS PS.NET system.
- f. Provide final Customer conversion database(s) and the current PS.NET for the final conversion run.



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| Telephone: (503) 846-8734 | Cust. Con.: |

Total Contract Value **\$785,170.00**

Project Payment Schedule

Hardware

| | | |
|-----------------------|------|--------------------|
| EIS Provided Hardware | 100% | on Delivery |
|-----------------------|------|--------------------|

Software and Services

| | | |
|-----------------------------------|-----|---------------------|
| Due on Signing of Contract | 40% | \$314,068.00 |
| Due on Acceptance of Project Plan | 10% | \$78,517.00 |
| Due on Installation Certification | 20% | \$157,034.00 |
| Due on Go-Live | 20% | \$157,034.00 |
| Due at Final Acceptance | 10% | \$78,517.00 |



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| Agency: Washington County, OR Sheriff's Office | Proposal Number: 19000142 Rev 4 |
| Address: 155 N First Ave., MS 28 | Proposal Modification Date: Jan 7, 2020 |
| Address: Hillsboro, OR 97124 | Proposal Expiration Date: Dec 31, 2019 |
| Contact: Suzi Fulcher (Suzi_Fulcher@co.washington.or.us) | Prepared By: A. Missler/C. Hussey |
| Telephone: (503) 846-8734 | Cust. Con.: |

PS.NET System Support Matrix

System Support Cost Calculations

1. EIS warrants the system software, customizations and services with standard EIS provided tier 1 7X24 warranty service.
2. EIS will provide the first three years of system support services, calculated at our standard support rate. and custom interfaces, based the module price for system software on the products licensed by the Agency.
3. Installation, Training and other Professional Services will not be included in the support calculations.
4. EIS will guarantee the support rate assessed for 2nd and 3rd year support.
5. EIS reserves the right to increase the support costs at a rate not to exceed (NTE) 5% of the previous years assessed support cost in Years 4 & 5.

Calculated Support Costs for On-going Support and Maintenance

| | First Year | 2nd Year | 3rd Year | 4th Year | 5th Year |
|--------------------------------|-------------------|---------------------|---------------------|------------------------------|------------------------------|
| Production Support Cost | Included | \$ 71,845.50 | \$ 75,437.78 | 3rd Year + (NTE 5% 3rd year) | 4th Year + (NTE 5% 4th year) |
| Training Instance | Included | \$ 18,000.00 | \$ 18,900.00 | 3rd Year + (NTE 5% 3rd year) | 4th Year + (NTE 5% 4th year) |
| | | \$ 89,845.50 | \$ 94,337.78 | 3rd Year + (NTE 5% 3rd year) | 4th Year + (NTE 5% 4th year) |



Executive Information Services, Inc. 1396 NE 20th Ave. Suite 100 - Ocala - FL - 34470 - Phone: (856) 701-6107

PRICING PROPOSAL

Agency: **Washington County, OR Sheriff's Office**

Proposal Number: **19000142 Rev 4**

Address: **155 N First Ave., MS 28**

Proposal Modification Date: **Jan 7, 2020**

Address: **Hillsboro, OR 97124**

Proposal Expiration Date: **Dec 31, 2019**

Contact: **Suzi Fulcher (Suzi_Fulcher@co.washington.or.us)**

Prepared By: **A. Missler/C. Hussey**

Telephone: **(503) 846-8734**

Cust. Con.:

Notes to Pricing

1. This proposal is submitted to the Agency by Executive Information Services, Inc. This proposal will expire as noted in the expiration date, unless extended by Executive Information Services, Inc.
2. Unless contractually negotiated otherwise, system price is based on a payment schedule of Forty (40) percent upon contract execution, balance of hardware price on date of delivery, and balance of contract price upon delivery of individual components. Services per contract terms.
3. All prices are FOB Destination. Sale prices quoted are exclusive of any state, local, use, or other applicable taxes. Hardware prices do not include shipping charges which will be added to the invoice.
4. Software pricing quoted is for a fully paid license for specified use on a networked computing system within the contract agency and is supplied subject to execution of a separate licensing and non-disclosure agreement which prohibits distribution, re-sale, or other disclosure outside of contracting agency. Full site licensing is included for the agency and there are no restrictions on the number of deployed workstations or users of the system within the agency.
5. All computing hardware, operating systems, database management systems, facility modifications, communications circuits, and network components not expressly provided in this proposal are the responsibility of the Agency.
6. Installation includes application software installation on user supplied computing platform, all table configuration, end-user training, network configuration, and similar activity. Installation also includes general network design consulting, network configuration, and installation and/or configuration of operating system software; including the Windows operating system and Microsoft SQL Server database management system. Agency is responsible for insuring that personnel are available and free of regular duty assignments during scheduled training periods. Training will require approximately 8 hours per person.



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ATTACHMENT G

EIS SOFTWARE AGREEMENT

Sales, Service and License Agreement

THIS AGREEMENT is made and entered into this __ day of _January, 2020, by and between Washington County Sheriff's Office, OR, located at 215 SW Adams Ave, Hillsboro, OR 97123 (hereinafter "CUSTOMER"), and Executive Information Services, Inc., a Nevada Corporation located at 1396 NE 20th Ave. Suite 100, Ocala, FL 34470 (hereinafter "CONTRACTOR").

RECITALS

WHEREAS,

- (a) the CUSTOMER agreed to purchase from CONTRACTOR the installation, implementation, training and other professional services described in a written statement of work signed by each of the parties that references this Agreement ("Services") and third party equipment ("Equipment") identified in Schedule A;
- (b) the CUSTOMER wishes to license from CONTRACTOR the software and related documentation ("Licensed Software"), including: (i) CONTRACTOR owned software and related documentation ("CONTRACTOR Software") which shall include any updates and upgrades provided by CONTRACTOR pursuant to the first year warranty support described in Schedule C ("Warranty Support"), as well as (ii) third party software and related documentation ("Third Party Software"), in each case as identified in the attached Schedule A; and
- (c) CONTRACTOR has agreed to provide the Services, sell the Equipment and license to CUSTOMER the Licensed Software subject to the terms and conditions of this Agreement.

THE PARTIES HEREBY AGREE AS FOLLOWS:

1. **Scope of Services.** CONTRACTOR shall supply those products and perform those services specified in Schedule A, entitled "SCOPE OF SERVICES", which is attached hereto and incorporated herein.
2. **Product.** The product is the Software, Hardware and Services herein collectively referred to as the "Product", itemized in the Pricing Proposal and defined in the Statement of Work. These statements are attached hereto and are a part of this Agreement.
3. **Contractors Proposal.** This AGREEMENT shall include CONTRACTORS proposal which is incorporated herein. In the event of any inconsistency between the terms of the proposal and this AGREEMENT, this AGREEMENT shall govern.



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4. **Term of Agreement.** The term of this AGREEMENT shall be from the date of execution to either 30 days following the acceptance of the system as operational or receipt by the CONTRACTOR of the final system payment from the CUSTOMER whichever occurs first, inclusive unless earlier terminated as provided herein.
5. **Performance.** Delivery and implementation of products and services itemized in Schedule A will be coordinated with designated officials of CUSTOMER and provided on a mutually acceptable schedule.
6. **Compensation.** In consideration for the provision by CONTRACTOR to CUSTOMER of the Equipment and Services and the license granted by CONTRACTOR to CUSTOMER for the Licensed Software, CUSTOMER shall pay CONTRACTOR the fees set forth in the attached Schedule A in accordance with the payment terms set forth in an attached system payment plan (Schedule B). The total amount payable to the CONTRACTOR by the CUSTOMER shall be the Contract Amount as above provided plus the amount of any applicable sales, use, or other taxes. CUSTOMER agrees to pay all Invoices within thirty (30) days of invoice date. CUSTOMER agrees to pay EIS a late payment finance charge equal to one and one percent (1%) per month of the unpaid balance.
7. **Taxes.** The Fees do not include taxes. If CONTRACTOR is required to pay any federal, state, or local taxes related to the Equipment, Services or Licensed Software provided hereunder, the taxes (other than taxes based on CONTRACTOR'S income) shall be billed to and paid by CUSTOMER. CUSTOMER is solely responsible for payment of any taxes resulting from CUSTOMER'S acceptance of this Agreement and CUSTOMER'S possession and use of the Product.
8. **License.** Subject to terms of this AGREEMENT, In accordance with the terms and conditions of this Agreement and subject to (i) the payment by CUSTOMER of the Fees and (ii) any restrictions, terms or conditions imposed by a third party in connection with its Third Party Software, CONTRACTOR hereby grants CUSTOMER a personal, perpetual (subject to Section 18), non-exclusive, non-transferable, revocable license itemized in Schedule A to use the Licensed Software at the Authorized Site(s), in object code format only, solely for CUSTOMER'S internal data processing purposes (the "License"). In the event of a conflict between this License and the restrictions, terms or conditions of a third party with respect to its Third Party Software, the third party restrictions, terms, and conditions shall govern. Upon reasonable notice and during normal business hours, CUSTOMER shall grant CONTRACTOR physical access to the Authorized Site(s) in order for CONTRACTOR to inspect the Authorized Site(s) and audit CUSTOMER'S use of the Licensed Software. CUSTOMER may not sell, lease, assign, sublicense, or otherwise transfer or disclose the Software in whole or in part, to any third party. The License shall remain in effect until terminated.

This Agreement allows you, the CUSTOMER to:



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- a) Install and use the Software on a single computer for each license purchased and make one copy of the Software in machine-readable form solely for backup purposes. CUSTOMER must reproduce on any such copy all copyright notices and any other proprietary legends on the original copy of the Software.
- b) Install the Software on a storage device, such as a network server, and run the Software on an internal network, provided the number of client workstations running the Software does not exceed the number of licenses of the Software purchased.
- c) Use the Software either directly or indirectly or through commands, data or instructions from or to a computer not part of CUSTOMER's internal network, for Internet or Web-hosting services only by a user licensed to use this copy of the Software through a valid license. A copy of the Software must be purchased for each such client workstation.
- d) Reproduce documentation, online help, and screen capture images solely for internal use as reference material and training literature.
- e) CUSTOMER shall not decompile, disassemble or otherwise reverse engineer any of the Licensed Software or use any similar means to discover the source code or trade secrets contained therein. CUSTOMER may make and maintain no more than one (1) archival copy (for backup purposes only) of each item of Licensed Software, provided that each copy contains all legends and notices that appeared in the copies licensed by CONTRACTOR.
- f) In the event that CUSTOMER desires to use the Licensed Software at another site or change its Authorized Site(s), CUSTOMER shall provide CONTRACTOR with written notice thereof, including the location of the new site(s). Except with CONTRACTOR's prior written consent, CUSTOMER shall use the Licensed Software only at the Authorized Site(s).
- g) This Agreement does not transfer to CUSTOMER title to the Licensed Software or Proprietary Information, or any intellectual property contained therein. CUSTOMER may not rent, lease or sublicense the Software for any purpose. CUSTOMER may not modify the Software or create derivative works based upon the Software.
- h) If CUSTOMER is a unit or agency of the United States Government, CUSTOMER expressly agrees that the License is "commercial computer software" or "commercial computer software documentation". Absent a written agreement to the contrary, the rights granted herein are, in the case of civilian agency use, Restricted Rights, as defined by FAR §52.227.19, and, if for Department of Defense use, limited.



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- i) CUSTOMER may not release proprietary Software information such as Software database schemas or Software technical specifications.
 - j) CUSTOMER may terminate the CONTRACTOR license at any time by destroying all copies, modifications, or merged portions of the Software.
 - k) CUSTOMER may not export the Software into any country prohibited by the United States Export Administration Act and the regulations thereunder.
9. **Warranty.** CONTRACTOR warrants, for the benefit of the CUSTOMER only, that during the Twelve (12) month period following the signing of this Agreement (the “Warranty Period”), the CONTRACTOR Software will operate in material conformity with the functional specifications set forth in the applicable related documentation supplied in writing by CONTRACTOR as defined in Schedule A. As CUSTOMER’s exclusive remedy for any defect in the CONTRACTOR Software to perform to the foregoing warranty, CONTRACTOR shall, during the Warranty Period, provide reasonable efforts to correct and cure such nonconformity or defect of the CONTRACTOR Software as provided for in the Warranty Support, provided CUSTOMER notifies CONTRACTOR in writing of such failure(s) during the Warranty Period. Warranty Support shall only be provided for the Twelve (12) month period following the signing of this Agreement. Warranty, if any, on Custom Software (defined as software that CONTRACTOR has not made generally available to its customers or software that CONTRACTOR developed at the request of CUSTOMER) shall be defined in a separate agreement. CUSTOMER may purchase support services from CONTRACTOR for subsequent years following the expiry of Warranty Support pursuant to the terms and conditions of CONTRACTOR’s standard Software Support Agreement(s), which shall be executed hereafter. CONTRACTOR shall not be liable to CUSTOMER for any loss of profits; any incidental, special, exemplary, or consequential damages; or any demands or claims of other parties for any amount exceeding the total of payments made to CONTRACTOR under the Agreement, whether or not CONTRACTOR is aware of or has been advised of any such claims or demands.

CONTRACTOR’s sole obligation thereafter, and CUSTOMER’s exclusive remedy, for any defect or nonconformity in the Third Party Software and Equipment shall be for the CUSTOMER to cooperate with the manufacturer to provide CUSTOMER with the benefit, if any, of the warranty and support commitment of the third party manufacturers and suppliers of equipment and product. CONTRACTOR shall use commercially reasonable efforts during the Warranty Period to furnish CUSTOMER with appropriate updates to Third Party Software, provided and to the extent such corrections or updates are made available to CONTRACTOR from the applicable third party. Further, to the extent permitted by the appropriate manufacturer and applicable law, CONTRACTOR shall pass through to CUSTOMER the manufacturer(s)’ and/or supplier(s)’ warranties on all Equipment and Third Party Software.

Notwithstanding anything to the contrary set forth in this Agreement, CUSTOMER’S sole remedy for any



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nonconformity or malfunction in the Equipment or Third Party Software shall be with its respective manufacturer and/or supplier.

10. **Insurance.** CONTRACTOR shall maintain comprehensive, broad form, general public liability and automobile insurance against claims and liabilities for personal injury, death, or property damage, providing protection of at least \$1,000,000 for bodily injury or death to any one person for any one accident or occurrence and at least \$1,000,000 for property damage. CONTRACTOR shall furnish CUSTOMER with copies of all such policies or certificates upon request.
11. **Independent Contractor.** It is understood and agreed that CONTRACTOR, in the performance of the work and services agreed to be performed by CONTRACTOR, shall act as and be an independent CONTRACTOR and not an agent or employee of CUSTOMER.
12. **Assignability.** CUSTOMER may not assign or transfer this Agreement or any of its rights or obligations hereunder without the prior written consent of CONTRACTOR. Neither this agreement nor any portion shall be assigned by CONTRACTOR without prior written consent of CUSTOMER. CONTRACTOR may contract or subcontract any or its rights, duties or obligations under this Agreement to a third party selected by CONTRACTOR.
13. **Indemnification.** CONTRACTOR shall defend, indemnify and hold harmless CUSTOMER, its officers, employees, and agents against any claim, loss or liability arising out of or resulting in any way from Services performed under this AGREEMENT due to the willful or negligent acts (active or passive) or omissions by CONTRACTOR'S officers, employees or agents. The acceptance of said services and products by CUSTOMER shall not operate as a waiver of such right of indemnification.
14. **Intellectual Property Indemnification.** (a) CONTRACTOR, at its own expense, will defend and indemnify CUSTOMER against third party claims that the CONTRACTOR Software infringes a United States trademark or copyright protected under United States law, provided CUSTOMER (i) gives CONTRACTOR prompt written notice of such claims, (ii) permits CONTRACTOR to defend or settle the claims, and (iii) provides CONTRACTOR all reasonable assistance in defending or settling the claims.

(b) If the CONTRACTOR Software is subject to a third party claim of infringement, CONTRACTOR may elect to (i) obtain the right of continued use of such CONTRACTOR Software for CUSTOMER or (ii) replace or modify such CONTRACTOR Software to avoid such claim. If neither alternative is available on commercially reasonable terms, then, the applicable License will be terminated and no further Fees will accrue.

(c) CONTRACTOR will not defend or indemnify CUSTOMER if any claim of infringement (i) results from CUSTOMER's design or alteration of any CONTRACTOR Software or (ii) results from use of the CONTRACTOR



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Software in combination with any third party products not authorized by CONTRACTOR.

(d) This Section 14 states the entire liability of CONTRACTOR and CUSTOMER's sole and exclusive remedies for trademark, copyright and any other intellectual property infringement.

15. **Acts of Insolvency.** The CUSTOMER may terminate this AGREEMENT by written notice to the CONTRACTOR if the CONTRACTOR becomes insolvent, makes a general assignment for the benefit of creditors, suffers or permits the appointment of a receiver for its business or assets, becomes subject to any proceedings under any domestic bankruptcy or insolvency law or publicly announces liquidation proceedings.

In the event of such proceedings, the CUSTOMER may opt to continue the use of the Licensed Program for as long as it deems necessary or until it finds a suitable replacement. However, no act of insolvency on the part of the CONTRACTOR shall be interpreted as an extension or acknowledgment of right or title to the Licensed Program to CUSTOMER, such right and title falling to the principals, heirs or assigns of the CONTRACTOR.

16. **Liability.** Contractor agrees to perform the services in Schedule A in a professional manner and as otherwise set forth in this Agreement. Contractor warrants that custom and standard public safety application software provided to CUSTOMER will perform as specified by the AGREEMENT and in CONTRACTOR'S proposal. If Contractor is unable to cause software to perform as agreed, CUSTOMER shall be limited to its damages to a refund of the money paid for these services. CUSTOMER expressly agrees that CONTRACTOR shall not be liable to the CUSTOMER for any loss, liability, damage, cost or expense of CUSTOMER resulting from, or attributable to, the performance of the services. Except as provided herein, CONTRACTOR neither makes nor intends any express or implied warranties of any description including merchantability and/or fitness with respect to the services or any product thereof. CONTRACTOR disclaims all other warranties, either expressed or implied and representations with respect to the Software, except as stated in the Purchase Agreement.

In no event shall CONTRACTOR or its vendors, suppliers or licensors be liable to CUSTOMER or any third party for any indirect, incidental, special or exemplary or consequential damages, including without limitation, loss of profits or benefits, arising out of this agreement and even if advised of the possibility of such damages. In no event shall CONTRACTOR or its vendors, suppliers or licensors liability, whether in contract, tort or otherwise, exceed the amount of monies received by CONTRACTOR from CUSTOMER in connection with this agreement. The parties acknowledge that absent such limitation, CONTRACTOR would not be able to provide the equipment and services or license the licensed software to CUSTOMER for the consideration set forth in Schedule A. The cumulative liability of CONTRACTOR to the CUSTOMER for all claims arising in connection with this agreement shall not exceed the total fees and charges paid to CONTRACTOR by the CUSTOMER within the last 12 months.

17. **Non-Discrimination.** CONTRACTOR shall not discriminate, in any way, against any person on the basis of age,



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sex, race, color, creed or national origin in connection with or related to the performance of this AGREEMENT.

18. **Termination.** CUSTOMER shall have the right to terminate this AGREEMENT, without cause, by giving not less than thirty (30) days' written notice of termination. CONTRACTOR shall be entitled to payment for deliverables in progress including expenses incurred; to the extent, work has been performed satisfactorily.

(a) The CUSTOMER or CONTRACTOR may terminate this Agreement at any time, upon written notice, if the other party breaches a material term of this Agreement and fails to cure such breach within thirty (30) days of written notice of such breach by the non-breaching party. Either party may terminate this Agreement effective immediately if the other party (i) terminates or suspends its business activities; (ii) makes an assignment for the benefit of creditors; (iii) becomes subject to control of a trustee, receiver or similar authority; or (iv) becomes subject to any bankruptcy or insolvency proceeding and such proceeding is not dismissed within sixty (60) days. CONTRACTOR may terminate this Agreement immediately if CUSTOMER breaches Section 8.

(b) Upon termination or cancellation of this AGREEMENT or any License granted hereunder by CONTRACTOR, (i) the License to all Licensed Software, in the case of termination or cancellation of this AGREEMENT, (ii) the License to the specific item of Licensed Software, in the case of the termination or cancellation of the License to a specific item of Licensed Software, shall automatically terminate and (iii) CUSTOMER shall destroy (and certify such destruction in writing,) or return to CONTRACTOR all copies of the Licensed Software and any other Proprietary Information in CUSTOMER possession. Upon termination of this Agreement by COUNTY, (i) Section 8 and the License rights granted therein shall survive and continue for so long as COUNTY remains in compliance with its obligations under this Agreement, including without limitation, Sections 8 and 19; and (ii) all warranties made by CONTRACTOR shall automatically terminate. Any provisions which are required to ensure that the parties fully exercise their rights and obligations hereunder shall survive the termination or expiration of this Agreement.

19. **Confidentiality.** CONTRACTOR may disclose to CUSTOMER information which it considers confidential and proprietary, including without limitation, documentation, plans, business and technical information, marketing and other materials, software and data ("Proprietary Information"). CUSTOMER shall keep the Proprietary Information in confidence, protect the Proprietary Information from disclosure to third parties and restrict its use as provided in this AGREEMENT. CUSTOMER shall not copy Proprietary Information, in whole or in part, except as authorized by CONTRACTOR in writing. CUSTOMER acknowledges that unauthorized disclosure of Proprietary Information may cause substantial economic loss to CONTRACTOR and/or its vendors, suppliers and licensors and CONTRACTOR is entitled to obtain injunctive or other equitable relief in connection therewith.



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Upon termination or cancellation of this AGREEMENT or any License granted hereunder, (i) the License to all Licensed Software, in the case of termination or cancellation of this AGREEMENT, (ii) the License to the specific item of Licensed Software, in the case of the termination or cancellation of the License to a specific item of Licensed Software, shall automatically terminate and (iii) CUSTOMER shall destroy (and certify such destruction in writing,) or return to CONTRACTOR all copies of the Licensed Software and any other Proprietary Information in CUSTOMER's possession.

All Proprietary Information shall remain the property of CONTRACTOR or its vendors, suppliers, and licensors, as the case may be. Any ideas, concepts, inventions, know-how, data processing techniques, software, documentation, diagrams, schematics, blueprints or other materials developed by CONTRACTOR personnel (alone or jointly with CUSTOMER) in connection with this AGREEMENT shall be the exclusive property of CONTRACTOR.

CUSTOMER shall inform and instruct its employees and agents of their obligations under this Section 19.

Limits on Confidential Information. Confidential information shall be deemed proprietary to the CONTRACTOR except to the extent such information or portions of such information are deemed not to be confidential or privileged under state or federal law. Confidential Information shall not be deemed proprietary and the CUSTOMER shall have no obligation with respect to such information where the information (i) was independently developed by CUSTOMER without the use of the Confidential Information; or (ii) was ordered to be publicly released by the CUSTOMER by a court or competent jurisdiction.

This Section 19 will survive termination, expiration or cancellation of this AGREEMENT.

20. **Governing Law.** The validity, interpretation, performance and enforcement of this Agreement and all matters arising directly and indirectly from this Agreement ("Agreement Matters") shall be governed by the internal laws of the State of Oregon, without regard to any conflicts or choice of law rules.
21. **Compliance with Laws.** CONTRACTOR shall comply with all applicable laws, ordinances, codes and regulations of the federal, state and local governments.
22. **Waiver.** CONTRACTOR agrees that waiver by CUSTOMER of any breach or violation of any term or condition of this AGREEMENT shall not be deemed to be a waiver of any other term or condition contained herein or a waiver of any subsequent breach or violation of the same or any other term or condition. The acceptance by CUSTOMER of the performance of any work or services by CONTRACTOR shall not be deemed to be a waiver of any term or condition of this AGREEMENT.

23. Miscellaneous



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(a) All risk of loss or damage to Equipment and Licensed Software will pass to CUSTOMER upon delivery to the Authorized Site(s). Title to Equipment will pass to CUSTOMER upon payment in full of the applicable Fees, therefore.

(b) CONTRACTOR may reference CUSTOMER as a user of CONTRACTOR products and services in the promotion of CONTRACTOR products and services.

24. **Force Majeure.** Neither CUSTOMER nor CONTRACTOR shall be held responsible for delay or default caused by fire, riot, acts of God, terrorist acts, or other acts of political sabotage, or war where such cause was beyond the reasonable control of CUSTOMER or CONTRACTOR, respectively. CONTRACTOR shall, however, make all reasonable efforts to remove or eliminate such a cause of delay or default and shall, upon the cessation of the cause, diligently pursue performance of its obligations under this Contract.

25. **Notices.** Any notice required or permitted to be given shall be delivered by hand, by overnight courier, by fax with confirming letter mailed under the conditions described herein, or by registered or certified mail, postage prepaid, return receipt requested, to the address of the other party first set forth below. Notice so given shall be deemed effective when received, or if not received by reason of fault of the addressee, when delivered, addressed to the respective parties as follows:

TO CUSTOMER: Washington County Sheriff’s Office _____
215 SW Adams Ave, _____
Hillsboro, OR 97123 _____

TO CONTRACTOR Executive Information Services, Inc.
1396 NE 20th Ave. Suite 100
Ocala, FL 34470
(856) 701-6107.

26. **Agreement.** This AGREEMENT (including the Schedules referenced in it and attached to it) together with the Personal Services Contract entered into between the parties contemporaneously with this Agreement (including the additional documents and attachments incorporated therein) sets forth the entire AGREEMENT and understanding between the parties with respect to its subject matter and merges and supersedes all previous communications, proposals, negotiations, representations, understandings and AGREEMENTs, either oral or written, between the parties with respect to the subject matter hereof. The terms, provisions or conditions of any purchase order or other business form or written authorization used by CUSTOMER will have no effect on the rights, duties or obligations of the parties under, or otherwise modify, this AGREEMENT, regardless of any failure of CONTRACTOR to object to those terms, provisions or conditions.

Each paragraph and provision of this AGREEMENT are severable, and if one or more paragraphs or provisions are declared invalid, the remaining provisions of this AGREEMENT will remain in full force and effect.



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27. **Modification.** This Agreement constitutes the entire understanding between the parties hereto and may not be modified and/or amended unless any such modification or amendment is reduced to writing and signed by both CUSTOMER and CONTRACTOR. CUSTOMER understands and agrees that this Agreement supersedes any prior written or verbal agreement, promise, representation, understanding, or course of conduct between the parties.

IN WITNESS WHEREOF the parties hereto have caused this agreement to be executed the day and year first hereinabove written.

CUSTOMER

CONTRACTOR

_ Washington County Sheriff's Office _

Executive Information Services, Inc.

by _____

by _____

title _____

title _____

Date _____

Date _____

Approved as to form:

By _____

Title _____



Schedule A

PROJECT DELIVERABLES & SCOPE OF SERVICES

Product

The product is the Software, Products, and Services herein collectively referred to as the “Product”, itemized in the Pricing Proposal Number: 19000142 Rev 4__ Dated __January 7, 2020__

Sale and License

EIS hereby sells and licenses to Agency and Agency agrees to purchase and license from EIS for Agency’s purposes the Product. Agency is hereby licensed to use the EIS Software Modules identified in the EIS Quotation contingent upon the acceptance of EIS’s Computer Software License Agreement (“License Agreement”) to be provided with the software.

| <u>Part #</u> | <u>Description</u> | <u>License Level</u> | <u>Quantity</u> |
|---------------------------------------|--|----------------------|-----------------|
| Application Software | | | |
| JMSSVD | JMS Application Software | Agency/Site | 1 |
| JMSASP | JMS Viewer | Server | 1 |
| JMSPREBOOK | JMS Pre-Booking | Server | 1 |
| JMSPROG | JMS Programs Module | Agency/Site | 1 |
| MATX- | M2 Data Switch - | Agency/Site | 1 |
| ORLEDSQ | ORLEDS Inquiry Adapter (Includes 6 Standard Keys) | Agency/Site | 1 |
| JMSEMUG | Enhanced Mugshot Capture | Device | 1 |
| RMSSMS | Streaming Media Server Software | Agency/Site | 1 |
| MSBTS | Media Service Encoder | Agency/Site | 1 |
| BFINGER | Fingerprint Verification Engine* | Server | 1 |
| BIOENGSRV | Biometric Engine Server | Server | 1 |
| JMSWLHS | PocketJMS Software | Agency/Site | 1 |
| Interface/Application Software | | | |
| JMSLVS | JMS LiveScan Interface (Cogent export) | Agency/Site | 1 |
| | JMS LiveScan Interface (Cogent import) | Agency/Site | 1 |
| JMSCOM | JMS Inmate Phone Initiation Interface (GTL/Telemate) | Agency/Site | 1 |
| JMSKEF | JMS Inmate Commissary Interface (Keefe) | Agency/Site | 1 |
| JMSEMR | JMS Inmate EMR (NaphCare/Techcare export) | Agency/Site | 1 |
| | JMS Inmate EMR (NaphCare/Techcare import) | Agency/Site | 1 |
| TXT2DE | JMS DL Scan Import | Agency/Site | 1 |
| TXT2DT | - WA State DL Template | Agency/Site | 1 |
| TXT2DT | - OR State DL Template | Agency/Site | 1 |
| | SCAAP reporting Interface | Agency/Site | 1 |
| | SSA Report Interface | Agency/Site | 1 |
| | VINES - Provided directly by Apriss - NC EIS | Agency/Site | 1 |



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| | | | |
|------------------------------|---|-------------|-----|
| M2ORLJMSA | ORLEDS Integration Adapter JMS* | Agency/Site | 1 |
| SRVH11 | PBK Karpel Export View | Agency/Site | 1 |
| | JMS NIST File Import & Enrollment | Agency/Site | 1 |
| Professional Services | | | |
| SRVH1 | Project Management & Coordination Services | Hours | 440 |
| SRVH2 | Technical Services | Hours | 188 |
| SRVH7 | On-Site Installation | Hours | 156 |
| SRVH4 | Documentation & Reporting Services | Hours | 120 |
| SRVH5 | System Configuration Services | Hours | 356 |
| SRVH9 | Test/Training Instance Installation | Project | 1 |
| SRVH5 | Data Conversion - Tiburon JMS & Mugshot data | Project | 1 |
| SRVH5 | Data Conversion - PSWEB | Project | 1 |
| SRVH5 | Data Conversion - Jail Systems | Project | 1 |
| SRVH5 | Data Conversion - Rehab | Project | 1 |
| SRVH5 | Data Conversion - Cogent Data Migration and Enrollment | Project | 1 |
| Training Services | | | |
| SRVH8 | JMS Administration Training | Classes | 2 |
| SRVH9 | JMS User Training | Classes | 12 |
| SRV5 | Travel & Per Diem | As Proposed | N/A |
| Support Services | | | |
| | System Support (12 Months from System Go-Live) - Standard 7X24. | Month | 12 |
| Hardware | | | |
| | None | | |

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Schedule B

Payment Schedule

Total Contract Value: \$__785,170.00_____ USD

Payment Schedule

Project Payment Schedule

Hardware

| | | |
|-----------------------|------|--------------------|
| EIS Provided Hardware | 100% | on Delivery |
|-----------------------|------|--------------------|

Software and Services

| | | |
|----------------------------|-----|---------------------|
| Due on Signing of Contract | 40% | \$314,068.00 |
|----------------------------|-----|---------------------|

| | | |
|-----------------------------------|-----|--------------------|
| Due on Acceptance of Project Plan | 10% | \$78,517.00 |
|-----------------------------------|-----|--------------------|

| | | |
|-----------------------------------|-----|---------------------|
| Due on Installation Certification | 20% | \$157,034.00 |
|-----------------------------------|-----|---------------------|

| | | |
|----------------|-----|---------------------|
| Due on Go-Live | 20% | \$157,034.00 |
|----------------|-----|---------------------|

| | | |
|-------------------------|-----|--------------------|
| Due at Final Acceptance | 10% | \$78,517.00 |
|-------------------------|-----|--------------------|



Schedule C

SCHEDULE OF WARRANTY SUPPORT SERVICES

1.0 SUPPORT SERVICES

Executive Information Services, Inc. will provide Support Services (as that term is defined in Section 2.0) for licensed Software (as that term is defined in this Section 1.0) in accordance with the provisions of this document.

GENERAL PROVISIONS. Standard Support Services only relate to EIS application software that is validly licensed by Customer pursuant to a Sales, Service and License Agreement that is in effect between Customer and EIS (the “Software”). Support Service plans do not cover computer hardware, operating systems, e-mail systems, networks, network operating systems, or other computer or network components whether or not they were provided by Contractor. Support Services do include limited diagnostic services and coordination with hardware support vendors, communications vendors, E911 vendors, radio console vendors, and other involved third parties. All charges by third parties for system software licenses, cabling, hardware components, etc. are the responsibility of the Agency.

SUSPENDED SERVICE. Contractor will suspend Support Services on any Agency with an outstanding invoice more than 90 days in arrears. Agencies with suspended Support Services may have service reinstated by paying all back-due service fees, the annual support fee for the current period, and the then-current reinstatement fee. In the event that Agency terminates this Agreement or elects not to renew this Agreement and allows Support Services to lapse, in order to reinstate Support Services Agency will be required to enter into a new Support Services Agreement and will be required to pay all back-due Support Fees that would otherwise be applicable to the lapsed period in addition to the then current Support Fees for the new term.

COMPANY QUALIFICATIONS. Contractor has and will maintain the personnel, experience and knowledge necessary to qualify Contractor to perform the duties under this agreement.

DOJ COMPLIANCY. Contractor support personnel have undergone background checks. Agencies that require a CJIS vendor contract or need to maintain additional validation related to Contractor support personnel should contact EIS Support.



2.0 LISTING OF SERVICES

EIS provides the following software and technical support services and reserves the right to change or modify the services at any time and upon 45 days' notice to Agency (the "Support Services"). EIS will use commercially reasonable efforts to provide solutions for any problem or issue reported and determined to be in the EIS Software or documentation. While it is EIS's goal to provide an acceptable resolution for all incoming service requests, EIS cannot predict a resolution time and is unable to guarantee that all problems or issues can be resolved.

EIS personnel, when accessing Agency's network through a remote access connection and when providing on-site Support Services, shall comply with the company regulations provided to EIS in advance regarding security, safety and professional conduct.

1. Telephone Technical Support—Agency has access to EIS qualified technical and applications support personnel via the Call Center number listed herein. EIS will use reasonable efforts to resolve any query relating to EIS licensed Software or its use or operation by Agency.
2. Software Remediation—EIS will use its reasonable efforts to correct or circumvent any reported error in licensed Software in order to bring the Software into material conformance to the then current published documentation.
3. Diagnostic Services—Support Services include diagnostic services that may be reasonably required to correct reproducible errors or malfunctions in the licensed Software. EIS will also work closely with Agency personnel where necessary to coordinate repair efforts with other vendors or in-house technicians.
4. Interface Maintenance—Support Services on State Interface Gateways includes programming modifications mandated by State Agencies and agreed to by EIS in writing. New state switches requiring new gateways and completely different protocols or message formats may be subject to additional charges. Due to variability, changes to E-9-1-1 interfaces may be subject to additional charges. All other third party interface support is subject to additional charges.
5. System Notification Service—Periodically EIS releases electronic bulletins or newsletters designed to alert users to potential problems with EIS systems, virus threats, or provide best use recommendations.
6. General Systems Consulting—EIS provides limited consulting services when related to EIS products and product use within the Agency.
7. Software Updates—"Updates" means any published changes, additions or corrections to the Software that primarily include a minor modification or enhancement to the Software related to a bug fix, minor additional functionality that EIS makes generally available to its customers as part of its Support Services. Minor Updates are included in standard service plans. Minor Updates are normally provided via remote support facilities and do not involve on-site visits. Additional service packs or updates may be applied depending on individual agency circumstances. "Upgrades" means a major overhaul of the Software which is a complete new published version of the Software that modifies, revises or alters the Software and adds features, functionality or enhancements to such Software, that require significant database



changes, data conversions, re-installation of software systems, or extensive operator training, that EIS makes generally available to its customers and are subject to additional charges. Charges for major Upgrades depend on the scope of the changes, size of the agency, required days on site, and other factors related to implementation costs.

Updates are scheduled with each agency on a case by case basis and Agency has the option to accept or decline any update provided that EIS shall no longer be obligated to perform certain obligations as further described herein or in the EIS Sales, Service and License Agreement in the event that the Agency has failed to install any update. Due to variables in scheduled feature sets and program development, no guarantees of releases or release dates for any software are made. When Updates are anticipated, Agency will be provided the release notes corresponding to the Update.

8. Documentation Updates—Updated documentation for every release, Update or change to the system will be provided embedded within the application Software as part of the distribution software.

REMOTE ACCESS SUPPORT

Support Services are normally provided via a remote access connection to the Agency. This is normally done via a high speed Internet connection from the EIS Support Center to the customer site. EIS can provide programs for a secure link or will work with most existing Agency VPN's or security appliances. Low speed connections can degrade the ability of EIS to respond to client requests or provide updates. Remote Support Services include Updates, diagnostic services, and client initiated remote desktop sessions. At the agency's option, prior to establishing an unattended connection, EIS will email a connection notification to a defined email at the agency indicating that an external connection will be established to the agency's system. If the connection to the agency's servers result in the resolution of the reported issue, a SR closing email would be sent to the agency's notification list.

ON-SITE SUPPORT

At its own discretion, EIS will provide on-site support, if required. This is usually reserved for critical failures that render the system inoperable or seriously degrade system performance. Response time is dependent on distance, severity of the errors, and other factors and is coordinated with the designated Agency project manager.

3.0 SERVICE REQUESTS

A Service Request (SR) may be filed by Agency for any operational problem or Software error. An error is any reported malfunction or other defect in the EIS licensed Software that can be reproduced by EIS and that constitutes a non-conformity from the product documentation provided by EIS to Customer under the Sales, License and Services Agreement.

Regardless of how submitted, all Service Requests are documented in an on-line database at the EIS customer support WEB site along with remedial actions and other pertinent data.



EIS SSLA

SERVICE REQUEST SUBMISSION

Service Requests can be submitted by any means convenient to Agency; phone, fax, e-mail, or WEB. Critical high priority service requiring immediate assistance should be submitted by phone to the EIS Call Center. This is available 24 x 7. We request after hours calls be limited to emergency, priority 1 calls. Unless restricted by Agency, EIS will accept routine and emergency calls from any Agency personnel. Contact numbers and addresses are:

Mailing Address: Executive Information Services, Inc.
1396 NE 20th Avenue, Suite 100
Ocala, FL 34470

Call Center: (208) 580-0400
Fax Number: (209) 370-9921
WEB Site Address: www.goeis.net
Support Portal: www.portal.goeis.net
E-Mail Address: support@goeis.net
Automatic Problem Report: support@goeis.net

SUBMISSION GUIDELINES

1. Critical issues should be reported by telephone to the EIS Call Center (208) 580-0400
2. Issues and service requests can be submitted by any of the following.
 - a. Contact the EIS Call Center by telephone at the above number.
 - b. Send an e-mail with pertinent details on the issue to support@goeis.net. This will create an automatic service request in our system and notify support technicians. You will be provided details by return e-mail and your issue will be reviewed within 24 hours.
 - c. Log onto our support WEB site and submit the issue.
3. In all cases, the following details should be provided.
 - a. Full contact information including your name, your agency, contact phone number and e-mail address.
 - b. The particular program or product that is causing the issue.
 - c. All details you have on the issue.
 - d. Date/time the issue occurred
 - e. Workstation/Server where the issue occurred
 - f. Symptoms of the problem. What error message displayed.
 - g. Did the problem occur once or often? Is the problem erratic or consistent? Can the problem be duplicated and if so, what are the steps to duplicate it.
 - h. Enclose a screen shot if possible.
4. An automated system response is sent to the originator and designated Agency contacts when the service request is created in the system and whenever key details on the service request change in the system.
5. An agency can check their service request status at any time at the EIS Service Request portal above.

SERVICE LEVEL RESPONSE



EIS SSLA

Each Service Request is assigned a priority based on its severity and disruption to the Agency. EIS has set the following priorities guidelines.

| Priority | Level | Description | Processing |
|----------|-------------|--|--|
| 1 | Critical | A major system or sub-system has failed and become inoperable. For example a CAD has failed. Agency cannot perform a critical job function. Agency has initiated support request via direct telephone to EIS support desk. | Service is continuous. If the issue cannot be resolved by the answering technician, then escalation is immediate. Response time will vary from immediate to within several hours, but will not be longer than 4 hours |
| 2 | High | A major component or sub-system has failed. For example a state interface has failed and is seriously degrading the CAD system. Agency job function is degraded or limited. Agency has initiated support request via direct telephone to EIS support desk. | Service is determined by the nature of the problem and consultation with the Agency. The problem is given priority support and may be escalated as necessary. |
| 3 | Medium | A processing error has occurred or there is an error in processing. For example a data field is not saving in a report, a report has incorrect totals, etc. Agency experiences intermittent problem or minor degradation. | Service is routine. Escalation depends on circumstances. Program errors may be fixed by service packs, delayed to regular releases, or work-arounds applied as necessary. |
| 4 | Low | Low priority. Error in provided component causing operational function/feature to occasionally fail or cause minor inconvenience. | Service is generally handled in the course of regular system updates. Will be addressed as soon as feasible for EIS |
| 5 | Enhancement | Modification to the behavior of an existing feature, or the addition of a new feature/function or report at the request of the agency. | Enhancement request is reviewed and slated for development as determined by the EIS software review team. Enhancements are provided in the course of regular system updates. No commitment of delivery by EIS unless contractually stated. |

SERVICE REQUEST ASSIGNMENT

Each service request submitted is assigned to an EIS support technician that has responsibility for resolving the issue, keeping the Agency notified of progress on the issue, and ultimately resolving and closing the issue. The assigned person is provided in an automatic response to the requestor and is available on the support WEB portal. You may contact the assigned person at any time for an update on the status of the Service Request, to update priority, or to discuss additional details on the issue.



SERVICE REQUEST STATUS

Each Service Request is assigned a status. Status codes are:

OPEN The SR is actively being worked on by EIS

COMPLETE EIS has completed all work on the SR and is waiting authorization to close it.

CLOSED The SR is no longer active in the system. Closed SR's are no longer tracked by EIS.

ESCALATION

EIS has designated a group of senior technical and programming resources that are available for critical service requests that cannot be handled in the course of normal business. This team is notified immediately on all priority 1 service requests and notified when appropriate on other critical issues. EIS management reviews all escalated and priority 1 critical service requests on a weekly basis.

CLOSING SERVICE REQUEST

Service requests are closed based on consultation with Agency. A completed service request has its status changed to COMPLETE by EIS pending consultation and review for closure. An EIS representative will review the case with the originator or with a designated Agency contact before closing the support request. This may be by e-mail or phone as is most convenient. If a timely contact cannot be established for review, EIS will close the request.

An automatic system response is sent to the originator and all designated Agency contacts when a service request is closed.

PRODUCTION SYSTEM

Standard Support Services and escalation apply to Agency production systems. Licensed EIS Software on test, training, development, or other non-production systems receives a medium level response and is scheduled in consultation with the Agency.

EXCLUSIONS

1. EIS assumes no responsibility for computer hardware or third party software including operating systems, communications circuits, electronic mail systems, overall network performance, user profiles, and other network management functions.
2. Data backup and integrity checking is the responsibility of the agency.
3. Virus protection, system intrusions, security breaches, and malware protection are the responsibility of the agency.
4. Table maintenance, including offense code tables, are the responsibility of the agency. EIS provides utility and maintenance programs that facilitate this.
5. Access Control and security setup for agency users is the responsibility of the agency. EIS provides utility programs that facilitate this.



EIS SSLA

6. Errors caused by mis-use, use on inadequate or out of date hardware or operating system software. Errors caused by conflicts with other third party or Agency provided software.
7. New custom reports or report modifications are not included in standard Support Services.
8. If required, EIS may provide release notes, on-line tutorials or other training on new features or operational problems under the service agreement. Full training for new users or general training for the agency that requires on-site services is not included in the standard Support Services.
9. EIS shall not be required to provide Support Services for any non-current versions of the Software or for errors or deficiencies in the Software for which an Update has been provided to CUSTOMER that CUSTOMER elected not to accept and install.

ENHANCEMENT REQUESTS

Requested system enhancements, including new report requests, are considered for inclusion in EIS products at EIS's sole option. No guarantee of implementation is made and no timeframes are provided for any requested enhancements. *Enhancements and product content and feature sets are at the sole discretion of EIS. Custom feature requests are not included in standard support plans. Any feedback, ideas, and suggestions for enhancements to EIS Software that Agency submits will become the property of EIS. EIS may use this information for any EIS business purposes, without restriction, including for product support, development, for sale, license or other transfer to third parties without any obligation to Agency.*

4.0 AGENCY RESPONSIBILITIES

The level of service EIS can provide is dependent upon the cooperation of the Agency and the quantity of information that the Agency can provide. If the Agency cannot reproduce a problem or if the Agency cannot successfully gather adequate troubleshooting information, EIS may not be able to ultimately resolve the problem. Careful submission of service requests is an important Agency responsibility.

FACILITY, SYSTEM AND DATA ACCESS

In order to provide Agency with technical support, EIS may need to remotely access Agency computing environment. This access is for diagnostic, backup, or data recovery purposes only. Access methods and procedures are worked out with each customer individually. As part of Support Services, EIS may be given access to your data and may temporarily copy all or parts of databases from your systems. Data is not permanently retained and is destroyed when no longer required for diagnostics. Agency is notified of any data access in advance. If on-site services are required, EIS will require access to facilities and equipment on-site. Agency represents and warrants to EIS that Agency has obtained all necessary rights and consents from the owners of any data to provide such data to EIS for use by EIS in accordance with this Agreement.

CUSTOMER CONTACTS



EIS SSLA

A primary Agency contact is required on each agreement to obtain Support Services from EIS. Up to three additional Agency contacts can be provided to EIS. Agency contacts are sent all notifications on any service requests submitted by the agency and receive all EIS electronic notifications and communications.



EIS SSLA

Agency Information

Agency: _____

Address: _____

Main Phone: _____

Primary Contact: _____
Title: _____
Phone: (____) _____ Extension _____
E-Mail _____

Additional Contact: _____
Title: _____
Phone: (____) _____ Extension _____
E-Mail _____

Additional Contact: _____
Title: _____
Phone: (____) _____ Extension _____
E-Mail _____

Additional Contact: _____
Title: _____
Phone: (____) _____ Extension _____
E-Mail _____



EIS SSLA

Schedule D
COST PROPOSAL

WASHINGTON COUNTY MINUTE ORDER

4
Pages

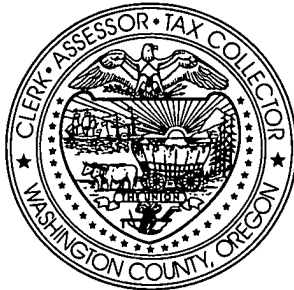


MINUTE ORDER

2019-334

Topic: Bid Award
Subject: Authorize Negotiations and Contract Award for Jail Custody Management System (2019.050P)
Dept: Sheriff's Office

FOR WASHINGTON COUNTY CLERK'S USE ONLY



FILED

OCT - 1 2019

Washington County
County Clerk



AGENDA

WASHINGTON COUNTY BOARD OF COMMISSIONERS

Agenda Category: Consent – Sheriff’s Office

Agenda Title: AUTHORIZE NEGOTIATIONS AND CONTRACT AWARD FOR JAIL CUSTODY MANAGEMENT SYSTEM (2019.050P)

Presented by: John Styer – Administrative Manager, Washington County Sheriff Office

SUMMARY:

Request your Board authorize negotiation and execution of a contract with Executive Information Services, Inc. (EIS) to provide and implement a Jail Custody Management System. The Washington County Jail currently utilizes Tiburon JMS and has built additional applications and solutions to fulfill business capability needs not provided by the Tiburon product. The Tiburon product has been in place since 2001 and no longer meets the needs of the Jail. Staff is looking for a new solution to increase the efficiency and effectiveness of the daily Jail Operations and emergency processes, as well as the efficiency and effectiveness of the Jail Staff in logging, searching, viewing, and connecting information across custody management workflows i.e. pre-book, booking, classification, management of inmate activities and appointments, incidents/discipline, sentencing, and reporting.

The required legal advertisements for the multi-tiered Request for Proposal (RFP) document were released April 03, 2019. Five responses to Tier One were received by the due date and time. Four responders were invited to, and did, submit proposals in response to Tier Two of the process based on their Tier One submittals. Based on the Tier Two submittals two proposers were selected to provide demonstrations. See Attachment A for the scoring detail of each Tier.

A selection committee consisting mostly of end users was formed to evaluate the two remaining systems (Executive Information Services, Inc. (EIS) and Black Creek Integrated Systems Corp. Each vendor was provided a script to follow for an 8-hour demonstration of their jail management system. The first thing that was noticed by the committee was Executive Information Services, Inc. (EIS) had loaded their system with criminal charges from Oregon. Black Creek was using charges from their home town on the east coast. This attention to detail from EIS stayed consistent throughout the demo.

(continued)

Attachment A: Scoring Information

DEPARTMENT’S REQUESTED ACTION:

Request your Board authorize negotiation and execution of a contract with Executive Information Services, Inc. (EIS) to provide and implement a Jail Custody Management System.

COUNTY ADMINISTRATOR’S RECOMMENDATION:

I concur with the requested action.

APPROVED WASHINGTON COUNTY
BOARD OF COMMISSIONERS

MINUTE ORDER # 19-334

DATE 10-1-19

BY Barbara Hejmanek
CLERK OF THE BOARD

| | |
|-----------------|-------------|
| Agenda Item No. | <u>2.j.</u> |
| Date: | 10/01/19 |

**AUTHORIZE NEGOTIATIONS AND CONTRACT AWARD FOR JAIL CUSTODY
MANAGEMENT SYSTEM (2019.050P)
BCC 10/01/19**

Advantages of EIS include: EIS has systems in many Oregon jails already, along with Clark County in Washington. Their system already addresses Measure 11 charges which are specific to the State of Oregon. Along with this, EIS allows for multiple arrests for a single booking. While this is not entirely unique to Oregon, it is not very common. EIS provides an intuitive pre-booking web application which can be used to significantly speed up the transfer of custody from arresting agencies to the jail. EIS allows for configurable alerts based on user defined parameters and customized workflows. The system uses SQL Server Reporting Services allowing us to adjust and build reports to our needs. EIS also allows direct access to our data.

Disadvantages of EIS include: the EIS screens are very busy with many data fields. Due to the customizable nature of the system, it will require a significant amount of time to develop the work flow, custom alerts, and reports. EIS also does not have extended narratives for each record which will require a work around.

Advantages of Black Creek Integrated Systems Corp include: Black Creek is a well-established system on the East Coast. They also provide a very customizable system including the ability to customize data elements for a "quick booking." The system is web based allowing access from many platforms. Black Creek stores all visitors, inmates, and victims in one table distinguishable with a type. Black Creek offers table level lock for editing data.

Disadvantages of Black Creek Integrated Systems Corp include: Black Creek has no installations in Oregon or on the West Coast. Their customer support is Central Time from 7:30 am to 5:30 pm. Outside of those hours you are directed to an "on call" technician. If two booking records are intentionally merged, Black Creek requires that you call their support desk to separate those records as it cannot be done by an on-site system administrator. Their web-based system is not compatible with Internet Explorer 11. Lastly, their last name field has limited size causing problems for inmates with long hyphenated names.

Based on these two demonstrations, the committee scored EIS above Black Creek.

ADDITIONAL INFORMATION:

Community Feedback (Known Support/Opposition): N/A

Legal History/Prior Board Action: On July 22, 1997 the Board authorized a contract with Tiburon, Inc. to provide a Custody Management Information System for the Washington County Jail. The system was completed and put into production in November 2000 and accepted in February of 2001.

Budget Impacts: Funding for the replacement JMS system is included in the Fiscal Year 19/20 ITS Demands as part of the FY19/20 adopted budget.

**AUTHORIZE NEGOTIATIONS AND CONTRACT AWARD FOR
JAIL CUSTODY MANAGEMENT SYSTEM (2019.050P)**

Attachment A – Scoring Information

Tier 1: Based on responses to the Required Function list

| Proposer: | Score out of a possible 680 points: |
|---|--|
| 1. Tyler Technologies | 545 |
| 2. Executive Information Services, Inc. (EIS) | 596 |
| 3. Beacon Software Solutions | 567 |
| 4. DXC Technology Services LLC | 645 |
| 5. Black Creek Integrated Systems Corp | 604 |

Based on scoring Tyler Technologies did not move on to Tier Two.

Tier 2: Based on written proposals

| Proposer: | Score out of a possible 110 points: |
|---|--|
| 1. Executive Information Services, Inc. (EIS) | 104 |
| 2. Beacon Software Solutions | 84.9 |
| 3. DXC Technology Services LLC | 73.5 |
| 4. Black Creek Integrated Systems Corp | 100.3 |

The top scoring proposers, EIS and Black Creek, were invited to provide demonstrations of their solutions.

Scripted demonstrations:

| Proposer: | Score out of a possible 120 points: |
|---|--|
| 1. Executive Information Services, Inc. (EIS) | 101 |
| 2. Black Creek Integrated Systems Corp | 75 |



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

01/10/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

| PRODUCER United Western Insurance Brokers 525 Cordova St., Suite 100 Pasadena CA 91101 | | CONTACT NAME: Maribel Sosa PHONE (A/C, No, Ext): (626) 397-4700 FAX (A/C, No): (626) 683-7682 E-MAIL ADDRESS: msosa@uwib.com | | | | | | | | | | | | | | | | | | | | | | |
|--|--|--|--|-------------------------------|--|--------|---------------------------------|--|-------|--|--|-------|--|--|-------|-------------------|--|--|-------------------|--|--|-------------------|--|--|
| INSURED Executive Information Services Inc 1396 NE 20th Ave Ste 100 Ocala FL 34470 | | <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th colspan="2" style="text-align: center;">INSURER(S) AFFORDING COVERAGE</th> <th style="text-align: center;">NAIC #</th> </tr> </thead> <tbody> <tr> <td style="width: 50%;">INSURER A: Hartford Fire</td> <td style="width: 50%;"></td> <td style="text-align: center;">19682</td> </tr> <tr> <td>INSURER B: Hartford Insurance Group-Multiple Carriers</td> <td></td> <td style="text-align: center;">00914</td> </tr> <tr> <td>INSURER C: ACE American Insurance Co.</td> <td></td> <td style="text-align: center;">22667</td> </tr> <tr> <td>INSURER D:</td> <td></td> <td></td> </tr> <tr> <td>INSURER E:</td> <td></td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> <td></td> </tr> </tbody> </table> | | INSURER(S) AFFORDING COVERAGE | | NAIC # | INSURER A: Hartford Fire | | 19682 | INSURER B: Hartford Insurance Group-Multiple Carriers | | 00914 | INSURER C: ACE American Insurance Co. | | 22667 | INSURER D: | | | INSURER E: | | | INSURER F: | | |
| INSURER(S) AFFORDING COVERAGE | | NAIC # | | | | | | | | | | | | | | | | | | | | | | |
| INSURER A: Hartford Fire | | 19682 | | | | | | | | | | | | | | | | | | | | | | |
| INSURER B: Hartford Insurance Group-Multiple Carriers | | 00914 | | | | | | | | | | | | | | | | | | | | | | |
| INSURER C: ACE American Insurance Co. | | 22667 | | | | | | | | | | | | | | | | | | | | | | |
| INSURER D: | | | | | | | | | | | | | | | | | | | | | | | | |
| INSURER E: | | | | | | | | | | | | | | | | | | | | | | | | |
| INSURER F: | | | | | | | | | | | | | | | | | | | | | | | | |

COVERAGES**CERTIFICATE NUMBER:** CL1961208005**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE | ADDL INSD | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS |
|----------|---|-----------|----------|---------------|-------------------------|-------------------------|---|
| A | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER: | Y | | 72SBAAG1732 | 06/01/2019 | 06/01/2020 | EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$ |
| A | <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY | | | 72SBAAG1732 | 06/01/2019 | 06/01/2020 | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ |
| A | <input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 10,000 | | | 72SBAAG1732 | 06/01/2019 | 06/01/2020 | EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 \$ |
| B | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below | | N/A | 72WECNZ1130 | 06/01/2019 | 06/01/2020 | <input checked="" type="checkbox"/> PER STATUTE <input checked="" type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000 |
| C | Technology Errors & Omissions, Network Liability -Claims Made | | | G2106841A013 | 06/01/2019 | 06/01/2020 | Each Wrongful Act Limit 1,000,000 Policy Aggregate Limit 1,000,000 Deductible 2,500 |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Washington County, its agents, officers, elected officials and employees, are named as Additional Insured as respects the operations of the named insured, if required by written contract.

The Technology Errors & Omissions policy includes provisions for Extended Reporting Period (Tail Coverage) 1 Year, 3 Years, and 5 Years, and is available if the policy is cancelled or non renewed.

CERTIFICATE HOLDER**CANCELLATION**

Washington County
215 SW Adams

Hillsboro

OR 97123

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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BUSINESS LIABILITY COVERAGE FORM

**QUICK REFERENCE
BUSINESS LIABILITY COVERAGE FORM
READ YOUR POLICY CAREFULLY**

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BUSINESS LIABILITY COVERAGE FORM

Various provisions in this policy restrict coverage. Read the entire policy carefully to determine rights, duties and what is and is not covered.

Throughout this policy the words "you" and "your" refer to the Named Insured shown in the Declarations. The words "we", "us" and "our" refer to the stock insurance company member of The Hartford providing this insurance.

The word "insured" means any person or organization qualifying as such under Section **C.** - Who Is An Insured.

Other words and phrases that appear in quotation marks have special meaning. Refer to Section **G.** - Liability And Medical Expenses Definitions.

A. COVERAGES

1. BUSINESS LIABILITY COVERAGE (BODILY INJURY, PROPERTY DAMAGE, PERSONAL AND ADVERTISING INJURY)

Insuring Agreement

- a. We will pay those sums that the insured becomes legally obligated to pay as damages because of "bodily injury", "property damage" or "personal and advertising injury" to which this insurance applies. We will have the right and duty to defend the insured against any "suit" seeking those damages. However, we will have no duty to defend the insured against any "suit" seeking damages for "bodily injury", "property damage" or "personal and advertising injury" to which this insurance does not apply.

We may, at our discretion, investigate any "occurrence" or offense and settle any claim or "suit" that may result. But:

- (1) The amount we will pay for damages is limited as described in Section **D.** - Liability And Medical Expenses Limits Of Insurance; and
- (2) Our right and duty to defend ends when we have used up the applicable limit of insurance in the payment of judgments, settlements or medical expenses to which this insurance applies.

No other obligation or liability to pay sums or perform acts or services is covered unless explicitly provided for under Coverage Extension - Supplementary Payments.

- b. This insurance applies:

- (1) To "bodily injury" and "property damage" only if:

- (a) The "bodily injury" or "property damage" is caused by an "occurrence" that takes place in the "coverage territory";

- (b) The "bodily injury" or "property damage" occurs during the policy period; and

- (c) Prior to the policy period, no insured listed under Paragraph 1. of Section **C.** - Who Is An Insured and no "employee" authorized by you to give or receive notice of an "occurrence" or claim, knew that the "bodily injury" or "property damage" had occurred, in whole or in part. If such a listed insured or authorized "employee" knew, prior to the policy period, that the "bodily injury" or "property damage" occurred, then any continuation, change or resumption of such "bodily injury" or "property damage" during or after the policy period will be deemed to have been known prior to the policy period.

- (2) To "personal and advertising injury" caused by an offense arising out of your business, but only if the offense was committed in the "coverage territory" during the policy period.

- c. "Bodily injury" or "property damage" will be deemed to have been known to have occurred at the earliest time when any insured listed under Paragraph 1. of Section **C.** - Who Is An Insured or any "employee" authorized by you to give or receive notice of an "occurrence" or claim:

- (1) Reports all, or any part, of the "bodily injury" or "property damage" to us or any other insurer;

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- (2) Receives a written or verbal demand or claim for damages because of the "bodily injury" or "property damage"; or
 - (3) Becomes aware by any other means that "bodily injury" or "property damage" has occurred or has begun to occur.
- d. Damages because of "bodily injury" include damages claimed by any person or organization for care, loss of services or death resulting at any time from the "bodily injury".

e. Incidental Medical Malpractice

- (1) "Bodily injury" arising out of the rendering of or failure to render professional health care services as a physician, dentist, nurse, emergency medical technician or paramedic shall be deemed to be caused by an "occurrence", but only if:
 - (a) The physician, dentist, nurse, emergency medical technician or paramedic is employed by you to provide such services; and
 - (b) You are not engaged in the business or occupation of providing such services.
- (2) For the purpose of determining the limits of insurance for incidental medical malpractice, any act or omission together with all related acts or omissions in the furnishing of these services to any one person will be considered one "occurrence".

2. MEDICAL EXPENSES**Insuring Agreement**

- a. We will pay medical expenses as described below for "bodily injury" caused by an accident:
 - (1) On premises you own or rent;
 - (2) On ways next to premises you own or rent; or
 - (3) Because of your operations;
 provided that:
 - (1) The accident takes place in the "coverage territory" and during the policy period;
 - (2) The expenses are incurred and reported to us within three years of the date of the accident; and
 - (3) The injured person submits to examination, at our expense, by physicians of our choice as often as we reasonably require.

- b. We will make these payments regardless of fault. These payments will not exceed the applicable limit of insurance. We will pay reasonable expenses for:

- (1) First aid administered at the time of an accident;
- (2) Necessary medical, surgical, x-ray and dental services, including prosthetic devices; and
- (3) Necessary ambulance, hospital, professional nursing and funeral services.

3. COVERAGE EXTENSION - SUPPLEMENTARY PAYMENTS

- a. We will pay, with respect to any claim or "suit" we investigate or settle, or any "suit" against an insured we defend:
 - (1) All expenses we incur.
 - (2) Up to \$1,000 for the cost of bail bonds required because of accidents or traffic law violations arising out of the use of any vehicle to which Business Liability Coverage for "bodily injury" applies. We do not have to furnish these bonds.
 - (3) The cost of appeal bonds or bonds to release attachments, but only for bond amounts within the applicable limit of insurance. We do not have to furnish these bonds.
 - (4) All reasonable expenses incurred by the insured at our request to assist us in the investigation or defense of the claim or "suit", including actual loss of earnings up to \$500 a day because of time off from work.
 - (5) All costs taxed against the insured in the "suit".
 - (6) Prejudgment interest awarded against the insured on that part of the judgment we pay. If we make an offer to pay the applicable limit of insurance, we will not pay any prejudgment interest based on that period of time after the offer.
 - (7) All interest on the full amount of any judgment that accrues after entry of the judgment and before we have paid, offered to pay, or deposited in court the part of the judgment that is within the applicable limit of insurance.

Any amounts paid under (1) through (7) above will not reduce the limits of insurance.

b. If we defend an insured against a "suit" and an indemnitee of the insured is also named as a party to the "suit", we will defend that indemnitee if all of the following conditions are met:

- (1) The "suit" against the indemnitee seeks damages for which the insured has assumed the liability of the indemnitee in a contract or agreement that is an "insured contract";
- (2) This insurance applies to such liability assumed by the insured;
- (3) The obligation to defend, or the cost of the defense of, that indemnitee, has also been assumed by the insured in the same "insured contract";
- (4) The allegations in the "suit" and the information we know about the "occurrence" are such that no conflict appears to exist between the interests of the insured and the interest of the indemnitee;
- (5) The indemnitee and the insured ask us to conduct and control the defense of that indemnitee against such "suit" and agree that we can assign the same counsel to defend the insured and the indemnitee; and
- (6) The indemnitee:
 - (a) Agrees in writing to:
 - (i) Cooperate with us in the investigation, settlement or defense of the "suit";
 - (ii) Immediately send us copies of any demands, notices, summonses or legal papers received in connection with the "suit";
 - (iii) Notify any other insurer whose coverage is available to the indemnitee; and
 - (iv) Cooperate with us with respect to coordinating other applicable insurance available to the indemnitee; and
 - (b) Provides us with written authorization to:
 - (i) Obtain records and other information related to the "suit"; and
 - (ii) Conduct and control the defense of the indemnitee in such "suit".

So long as the above conditions are met, attorneys' fees incurred by us in the defense of that indemnitee, necessary litigation expenses incurred by us and necessary litigation expenses incurred by the indemnitee at our request will be paid as Supplementary Payments.

Notwithstanding the provisions of Paragraph **1.b.(b)** of Section **B.** – Exclusions, such payments will not be deemed to be damages for "bodily injury" and "property damage" and will not reduce the Limits of Insurance.

Our obligation to defend an insured's indemnitee and to pay for attorneys' fees and necessary litigation expenses as Supplementary Payments ends when:

- (1) We have used up the applicable limit of insurance in the payment of judgments or settlements; or
- (2) The conditions set forth above, or the terms of the agreement described in Paragraph (6) above, are no longer met.

B. EXCLUSIONS

1. Applicable To Business Liability Coverage

This insurance does not apply to:

a. Expected Or Intended Injury

- (1) "Bodily injury" or "property damage" expected or intended from the standpoint of the insured. This exclusion does not apply to "bodily injury" or "property damage" resulting from the use of reasonable force to protect persons or property; or
- (2) "Personal and advertising injury" arising out of an offense committed by, at the direction of or with the consent or acquiescence of the insured with the expectation of inflicting "personal and advertising injury".

b. Contractual Liability

- (1) "Bodily injury" or "property damage"; or
- (2) "Personal and advertising injury"

for which the insured is obligated to pay damages by reason of the assumption of liability in a contract or agreement.

This exclusion does not apply to liability for damages because of:

- (a) "Bodily injury", "property damage" or "personal and advertising injury" that the insured would have in the absence of the contract or agreement; or

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(b) "Bodily injury" or "property damage" assumed in a contract or agreement that is an "insured contract", provided the "bodily injury" or "property damage" occurs subsequent to the execution of the contract or agreement. Solely for the purpose of liability assumed in an "insured contract", reasonable attorneys' fees and necessary litigation expenses incurred by or for a party other than an insured are deemed to be damages because of "bodily injury" or "property damage" provided:

- (i) Liability to such party for, or for the cost of, that party's defense has also been assumed in the same "insured contract", and
- (ii) Such attorneys' fees and litigation expenses are for defense of that party against a civil or alternative dispute resolution proceeding in which damages to which this insurance applies are alleged.

c. Liquor Liability

"Bodily injury" or "property damage" for which any insured may be held liable by reason of:

- (1) Causing or contributing to the intoxication of any person;
- (2) The furnishing of alcoholic beverages to a person under the legal drinking age or under the influence of alcohol; or
- (3) Any statute, ordinance or regulation relating to the sale, gift, distribution or use of alcoholic beverages.

This exclusion applies only if you are in the business of manufacturing, distributing, selling, serving or furnishing alcoholic beverages.

d. Workers' Compensation And Similar Laws

Any obligation of the insured under a workers' compensation, disability benefits or unemployment compensation law or any similar law.

e. Employer's Liability

"Bodily injury" to:

- (1) An "employee" of the insured arising out of and in the course of:
 - (a) Employment by the insured; or

(b) Performing duties related to the conduct of the insured's business, or

- (2) The spouse, child, parent, brother or sister of that "employee" as a consequence of (1) above.

This exclusion applies:

- (1) Whether the insured may be liable as an employer or in any other capacity; and
- (2) To any obligation to share damages with or repay someone else who must pay damages because of the injury.

This exclusion does not apply to liability assumed by the insured under an "insured contract".

f. Pollution

(1) "Bodily injury", "property damage" or "personal and advertising injury" arising out of the actual, alleged or threatened discharge, dispersal, seepage, migration, release or escape of "pollutants":

(a) At or from any premises, site or location which is or was at any time owned or occupied by, or rented or loaned to any insured. However, this subparagraph does not apply to:

(i) "Bodily injury" if sustained within a building and caused by smoke, fumes, vapor or soot produced by or originating from equipment that is used to heat, cool or dehumidify the building, or equipment that is used to heat water for personal use, by the building's occupants or their guests;

(ii) "Bodily injury" or "property damage" for which you may be held liable, if you are a contractor and the owner or lessee of such premises, site or location has been added to your policy as an additional insured with respect to your ongoing operations performed for that additional insured at that premises, site or location and such premises, site or location is not and never was owned or occupied by, or rented or loaned to, any insured, other than that additional insured; or

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- (iii) "Bodily injury" or "property damage" arising out of heat, smoke or fumes from a "hostile fire";
- (b) At or from any premises, site or location which is or was at any time used by or for any insured or others for the handling, storage, disposal, processing or treatment of waste;
- (c) Which are or were at any time transported, handled, stored, treated, disposed of, or processed as waste by or for:
- (i) Any insured; or
- (ii) Any person or organization for whom you may be legally responsible;
- (d) At or from any premises, site or location on which any insured or any contractors or subcontractors working directly or indirectly on any insured's behalf are performing operations if the "pollutants" are brought on or to the premises, site or location in connection with such operations by such insured, contractor or subcontractor. However, this subparagraph does not apply to:
- (i) "Bodily injury" or "property damage" arising out of the escape of fuels, lubricants or other operating fluids which are needed to perform the normal electrical, hydraulic or mechanical functions necessary for the operation of "mobile equipment" or its parts, if such fuels, lubricants or other operating fluids escape from a vehicle part designed to hold, store or receive them. This exception does not apply if the "bodily injury" or "property damage" arises out of the intentional discharge, dispersal or release of the fuels, lubricants or other operating fluids, or if such fuels, lubricants or other operating fluids are brought on or to the premises, site or location with the intent that they be discharged, dispersed or released as part of the operations being performed by such insured, contractor or subcontractor;
- (ii) "Bodily injury" or "property damage" sustained within a building and caused by the release of gases, fumes or vapors from materials brought into that building in connection with operations being performed by you or on your behalf by a contractor or subcontractor; or
- (iii) "Bodily injury" or "property damage" arising out of heat, smoke or fumes from a "hostile fire"; or
- (e) At or from any premises, site or location on which any insured or any contractors or subcontractors working directly or indirectly on any insured's behalf are performing operations if the operations are to test for, monitor, clean up, remove, contain, treat, detoxify or neutralize, or in any way respond to, or assess the effects of, "pollutants".
- (2) Any loss, cost or expense arising out of any:
- (a) Request, demand, order or statutory or regulatory requirement that any insured or others test for, monitor, clean up, remove, contain, treat, detoxify or neutralize, or in any way respond to, or assess the effects of, "pollutants"; or
- (b) Claim or suit by or on behalf of a governmental authority for damages because of testing for, monitoring, cleaning up, removing, containing, treating, detoxifying or neutralizing, or in any way responding to, or assessing the effects of, "pollutants".
- However, this paragraph does not apply to liability for damages because of "property damage" that the insured would have in the absence of such request, demand, order or statutory or regulatory requirement, or such claim or "suit" by or on behalf of a governmental authority.

BUSINESS LIABILITY COVERAGE FORM**g. Aircraft, Auto Or Watercraft**

"Bodily injury" or "property damage" arising out of the ownership, maintenance, use or entrustment to others of any aircraft, "auto" or watercraft owned or operated by or rented or loaned to any insured. Use includes operation and "loading or unloading".

This exclusion applies even if the claims against any insured allege negligence or other wrongdoing in the supervision, hiring, employment, training or monitoring of others by that insured, if the "occurrence" which caused the "bodily injury" or "property damage" involved the ownership, maintenance, use or entrustment to others of any aircraft, "auto" or watercraft that is owned or operated by or rented or loaned to any insured.

This exclusion does not apply to:

- (1) A watercraft while ashore on premises you own or rent;
- (2) A watercraft you do not own that is:
 - (a) Less than 51 feet long; and
 - (b) Not being used to carry persons for a charge;
- (3) Parking an "auto" on, or on the ways next to, premises you own or rent, provided the "auto" is not owned by or rented or loaned to you or the insured;
- (4) Liability assumed under any "insured contract" for the ownership, maintenance or use of aircraft or watercraft;
- (5) "Bodily injury" or "property damage" arising out of the operation of any of the equipment listed in Paragraph **f.(2)** or **f.(3)** of the definition of "mobile equipment"; or
- (6) An aircraft that is not owned by any insured and is hired, chartered or loaned with a paid crew. However, this exception does not apply if the insured has any other insurance for such "bodily injury" or "property damage", whether the other insurance is primary, excess, contingent or on any other basis.

h. Mobile Equipment

"Bodily injury" or "property damage" arising out of:

- (1) The transportation of "mobile equipment" by an "auto" owned or operated by or rented or loaned to any insured; or

- (2) The use of "mobile equipment" in, or while in practice or preparation for, a prearranged racing, speed or demolition contest or in any stunting activity.

i. War

"Bodily injury", "property damage" or "personal and advertising injury", however caused, arising, directly or indirectly, out of:

- (1) War, including undeclared or civil war;
- (2) Warlike action by a military force, including action in hindering or defending against an actual or expected attack, by any government, sovereign or other authority using military personnel or other agents; or
- (3) Insurrection, rebellion, revolution, usurped power, or action taken by governmental authority in hindering or defending against any of these.

j. Professional Services

"Bodily injury", "property damage" or "personal and advertising injury" arising out of the rendering of or failure to render any professional service. This includes but is not limited to:

- (1) Legal, accounting or advertising services;
- (2) Preparing, approving, or failing to prepare or approve maps, shop drawings, opinions, reports, surveys, field orders, change orders, designs or drawings and specifications;
- (3) Supervisory, inspection, architectural or engineering activities;
- (4) Medical, surgical, dental, x-ray or nursing services treatment, advice or instruction;
- (5) Any health or therapeutic service treatment, advice or instruction;
- (6) Any service, treatment, advice or instruction for the purpose of appearance or skin enhancement, hair removal or replacement or personal grooming;
- (7) Optical or hearing aid services including the prescribing, preparation, fitting, demonstration or distribution of ophthalmic lenses and similar products or hearing aid devices;

- (8) Optometry or optometric services including but not limited to examination of the eyes and the prescribing, preparation, fitting, demonstration or distribution of ophthalmic lenses and similar products;
- (9) Any:
 - (a) Body piercing (not including ear piercing);
 - (b) Tattooing, including but not limited to the insertion of pigments into or under the skin; and
 - (c) Similar services;
- (10) Services in the practice of pharmacy; and
- (11) Computer consulting, design or programming services, including web site design.

Paragraphs (4) and (5) of this exclusion do not apply to the Incidental Medical Malpractice coverage afforded under Paragraph 1.e. in Section A. - Coverages.

k. Damage To Property

"Property damage" to:

- (1) Property you own, rent or occupy, including any costs or expenses incurred by you, or any other person, organization or entity, for repair, replacement, enhancement, restoration or maintenance of such property for any reason, including prevention of injury to a person or damage to another's property;
- (2) Premises you sell, give away or abandon, if the "property damage" arises out of any part of those premises;
- (3) Property loaned to you;
- (4) Personal property in the care, custody or control of the insured;
- (5) That particular part of real property on which you or any contractors or subcontractors working directly or indirectly on your behalf are performing operations, if the "property damage" arises out of those operations; or
- (6) That particular part of any property that must be restored, repaired or replaced because "your work" was incorrectly performed on it.

Paragraphs (1), (3) and (4) of this exclusion do not apply to "property damage" (other than damage by fire) to premises, including the contents of such premises, rented to you for a period of 7 or fewer consecutive days. A separate Limit of Insurance applies to Damage To Premises Rented To You as described in Section D. - Limits Of Insurance.

Paragraph (2) of this exclusion does not apply if the premises are "your work" and were never occupied, rented or held for rental by you.

Paragraphs (3) and (4) of this exclusion do not apply to the use of elevators.

Paragraphs (3), (4), (5) and (6) of this exclusion do not apply to liability assumed under a sidetrack agreement.

Paragraphs (3) and (4) of this exclusion do not apply to "property damage" to borrowed equipment while not being used to perform operations at a job site.

Paragraph (6) of this exclusion does not apply to "property damage" included in the "products-completed operations hazard".

l. Damage To Your Product

"Property damage" to "your product" arising out of it or any part of it.

m. Damage To Your Work

"Property damage" to "your work" arising out of it or any part of it and included in the "products-completed operations hazard".

This exclusion does not apply if the damaged work or the work out of which the damage arises was performed on your behalf by a subcontractor.

n. Damage To Impaired Property Or Property Not Physically Injured

"Property damage" to "impaired property" or property that has not been physically injured, arising out of:

- (1) A defect, deficiency, inadequacy or dangerous condition in "your product" or "your work"; or
- (2) A delay or failure by you or anyone acting on your behalf to perform a contract or agreement in accordance with its terms.

This exclusion does not apply to the loss of use of other property arising out of sudden and accidental physical injury to "your product" or "your work" after it has been put to its intended use.

BUSINESS LIABILITY COVERAGE FORM**o. Recall Of Products, Work Or Impaired Property**

Damages claimed for any loss, cost or expense incurred by you or others for the loss of use, withdrawal, recall, inspection, repair, replacement, adjustment, removal or disposal of:

- (1) "Your product";
- (2) "Your work"; or
- (3) "Impaired property";

if such product, work or property is withdrawn or recalled from the market or from use by any person or organization because of a known or suspected defect, deficiency, inadequacy or dangerous condition in it.

p. Personal And Advertising Injury

"Personal and advertising injury":

- (1) Arising out of oral, written or electronic publication of material, if done by or at the direction of the insured with knowledge of its falsity;
- (2) Arising out of oral, written or electronic publication of material whose first publication took place before the beginning of the policy period;
- (3) Arising out of a criminal act committed by or at the direction of the insured;
- (4) Arising out of any breach of contract, except an implied contract to use another's "advertising idea" in your "advertisement";
- (5) Arising out of the failure of goods, products or services to conform with any statement of quality or performance made in your "advertisement";
- (6) Arising out of the wrong description of the price of goods, products or services;
- (7) Arising out of any violation of any intellectual property rights such as copyright, patent, trademark, trade name, trade secret, service mark or other designation of origin or authenticity.

However, this exclusion does not apply to infringement, in your "advertisement", of

- (a) Copyright;
- (b) Slogan, unless the slogan is also a trademark, trade name, service mark or other designation of origin or authenticity; or

(c) Title of any literary or artistic work;

- (8) Arising out of an offense committed by an insured whose business is:
 - (a) Advertising, broadcasting, publishing or telecasting;
 - (b) Designing or determining content of web sites for others; or
 - (c) An Internet search, access, content or service provider.

However, this exclusion does not apply to Paragraphs **a.**, **b.** and **c.** under the definition of "personal and advertising injury" in Section **G.** – Liability And Medical Expenses Definitions.

For the purposes of this exclusion, placing an "advertisement" for or linking to others on your web site, by itself, is not considered the business of advertising, broadcasting, publishing or telecasting;

- (9) Arising out of an electronic chat room or bulletin board the insured hosts, owns, or over which the insured exercises control;
- (10) Arising out of the unauthorized use of another's name or product in your e-mail address, domain name or metatags, or any other similar tactics to mislead another's potential customers;
- (11) Arising out of the violation of a person's right of privacy created by any state or federal act.

However, this exclusion does not apply to liability for damages that the insured would have in the absence of such state or federal act;

- (12) Arising out of:
 - (a) An "advertisement" for others on your web site;
 - (b) Placing a link to a web site of others on your web site;
 - (c) Content from a web site of others displayed within a frame or border on your web site. Content includes information, code, sounds, text, graphics or images; or
 - (d) Computer code, software or programming used to enable:
 - (i) Your web site; or
 - (ii) The presentation or functionality of an "advertisement" or other content on your web site;

- (13) Arising out of a violation of any anti-trust law;
- (14) Arising out of the fluctuation in price or value of any stocks, bonds or other securities; or
- (15) Arising out of discrimination or humiliation committed by or at the direction of any "executive officer", director, stockholder, partner or member of the insured.

q. Electronic Data

Damages arising out of the loss of, loss of use of, damage to, corruption of, inability to access, or inability to manipulate "electronic data".

r. Employment-Related Practices

"Bodily injury" or "personal and advertising injury" to:

- (1) A person arising out of any:
 - (a) Refusal to employ that person;
 - (b) Termination of that person's employment; or
 - (c) Employment-related practices, policies, acts or omissions, such as coercion, demotion, evaluation, reassignment, discipline, defamation, harassment, humiliation or discrimination directed at that person; or
- (2) The spouse, child, parent, brother or sister of that person as a consequence of "bodily injury" or "personal and advertising injury" to the person at whom any of the employment-related practices described in Paragraphs (a), (b), or (c) above is directed.

This exclusion applies:

- (1) Whether the insured may be liable as an employer or in any other capacity; and
- (2) To any obligation to share damages with or repay someone else who must pay damages because of the injury.

s. Asbestos

- (1) "Bodily injury", "property damage" or "personal and advertising injury" arising out of the "asbestos hazard".
- (2) Any damages, judgments, settlements, loss, costs or expenses that:

- (a) May be awarded or incurred by reason of any claim or suit alleging actual or threatened injury or damage of any nature or kind to persons or property which would not have occurred in whole or in part but for the "asbestos hazard";
- (b) Arise out of any request, demand, order or statutory or regulatory requirement that any insured or others test for, monitor, clean up, remove, encapsulate, contain, treat, detoxify or neutralize or in any way respond to or assess the effects of an "asbestos hazard"; or
- (c) Arise out of any claim or suit for damages because of testing for, monitoring, cleaning up, removing, encapsulating, containing, treating, detoxifying or neutralizing or in any way responding to or assessing the effects of an "asbestos hazard".

t. Violation Of Statutes That Govern E-Mails, Fax, Phone Calls Or Other Methods Of Sending Material Or Information

"Bodily injury", "property damage", or "personal and advertising injury" arising directly or indirectly out of any action or omission that violates or is alleged to violate:

- (1) The Telephone Consumer Protection Act (TCPA), including any amendment of or addition to such law;
- (2) The CAN-SPAM Act of 2003, including any amendment of or addition to such law; or
- (3) Any statute, ordinance or regulation, other than the TCPA or CAN-SPAM Act of 2003, that prohibits or limits the sending, transmitting, communicating or distribution of material or information.

Damage To Premises Rented To You – Exception For Damage By Fire, Lightning or Explosion

Exclusions **c.** through **h.** and **k.** through **o.** do not apply to damage by fire, lightning or explosion to premises rented to you or temporarily occupied by you with permission of the owner. A separate Limit of Insurance applies to this coverage as described in Section **D.** - Liability And Medical Expenses Limits Of Insurance.

BUSINESS LIABILITY COVERAGE FORM**2. Applicable To Medical Expenses Coverage**

We will not pay expenses for "bodily injury":

a. Any Insured

To any insured, except "volunteer workers".

b. Hired Person

To a person hired to do work for or on behalf of any insured or a tenant of any insured.

c. Injury On Normally Occupied Premises

To a person injured on that part of premises you own or rent that the person normally occupies.

d. Workers' Compensation And Similar Laws

To a person, whether or not an "employee" of any insured, if benefits for the "bodily injury" are payable or must be provided under a workers' compensation or disability benefits law or a similar law.

e. Athletics Activities

To a person injured while practicing, instructing or participating in any physical exercises or games, sports or athletic contests.

f. Products-Completed Operations Hazard

Included with the "products-completed operations hazard".

g. Business Liability Exclusions

Excluded under Business Liability Coverage.

C. WHO IS AN INSURED**1. If you are designated in the Declarations as:**

- a.** An individual, you and your spouse are insureds, but only with respect to the conduct of a business of which you are the sole owner.
- b.** A partnership or joint venture, you are an insured. Your members, your partners, and their spouses are also insureds, but only with respect to the conduct of your business.
- c.** A limited liability company, you are an insured. Your members are also insureds, but only with respect to the conduct of your business. Your managers are insureds, but only with respect to their duties as your managers.
- d.** An organization other than a partnership, joint venture or limited liability company, you are an insured. Your "executive officers" and directors are insureds, but only with respect to their duties as your officers or directors. Your stockholders are also insureds, but only with respect to their liability as stockholders.

- e.** A trust, you are an insured. Your trustees are also insureds, but only with respect to their duties as trustees.

2. Each of the following is also an insured:**a. Employees And Volunteer Workers**

Your "volunteer workers" only while performing duties related to the conduct of your business, or your "employees", other than either your "executive officers" (if you are an organization other than a partnership, joint venture or limited liability company) or your managers (if you are a limited liability company), but only for acts within the scope of their employment by you or while performing duties related to the conduct of your business.

However, none of these "employees" or "volunteer workers" are insureds for:

- (1) "Bodily injury" or "personal and advertising injury":**
 - (a)** To you, to your partners or members (if you are a partnership or joint venture), to your members (if you are a limited liability company), or to a co-"employee" while in the course of his or her employment or performing duties related to the conduct of your business, or to your other "volunteer workers" while performing duties related to the conduct of your business;
 - (b)** To the spouse, child, parent, brother or sister of that co-"employee" or that "volunteer worker" as a consequence of Paragraph **(1)(a)** above;
 - (c)** For which there is any obligation to share damages with or repay someone else who must pay damages because of the injury described in Paragraphs **(1)(a)** or **(b)** above; or
 - (d)** Arising out of his or her providing or failing to provide professional health care services.

If you are not in the business of providing professional health care services, Paragraph **(d)** does not apply to any nurse, emergency medical technician or paramedic employed by you to provide such services.
- (2) "Property damage" to property:**
 - (a)** Owned, occupied or used by,

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(b) Rented to, in the care, custody or control of, or over which physical control is being exercised for any purpose by you, any of your "employees", "volunteer workers", any partner or member (if you are a partnership or joint venture), or any member (if you are a limited liability company).

b. Real Estate Manager

Any person (other than your "employee" or "volunteer worker"), or any organization while acting as your real estate manager.

c. Temporary Custodians Of Your Property

Any person or organization having proper temporary custody of your property if you die, but only:

- (1) With respect to liability arising out of the maintenance or use of that property; and
- (2) Until your legal representative has been appointed.

d. Legal Representative If You Die

Your legal representative if you die, but only with respect to duties as such. That representative will have all your rights and duties under this insurance.

e. Unnamed Subsidiary

Any subsidiary and subsidiary thereof, of yours which is a legally incorporated entity of which you own a financial interest of more than 50% of the voting stock on the effective date of this Coverage Part.

The insurance afforded herein for any subsidiary not shown in the Declarations as a named insured does not apply to injury or damage with respect to which an insured under this insurance is also an insured under another policy or would be an insured under such policy but for its termination or upon the exhaustion of its limits of insurance.

3. Newly Acquired Or Formed Organization

Any organization you newly acquire or form, other than a partnership, joint venture or limited liability company, and over which you maintain financial interest of more than 50% of the voting stock, will qualify as a Named Insured if there is no other similar insurance available to that organization. However:

- a. Coverage under this provision is afforded only until the 180th day after you acquire or form the organization or the end of the policy period, whichever is earlier; and

b. Coverage under this provision does not apply to:

- (1) "Bodily injury" or "property damage" that occurred; or
- (2) "Personal and advertising injury" arising out of an offense committed before you acquired or formed the organization.

4. Operator Of Mobile Equipment

With respect to "mobile equipment" registered in your name under any motor vehicle registration law, any person is an insured while driving such equipment along a public highway with your permission. Any other person or organization responsible for the conduct of such person is also an insured, but only with respect to liability arising out of the operation of the equipment, and only if no other insurance of any kind is available to that person or organization for this liability. However, no person or organization is an insured with respect to:

- a. "Bodily injury" to a co-"employee" of the person driving the equipment; or
- b. "Property damage" to property owned by, rented to, in the charge of or occupied by you or the employer of any person who is an insured under this provision.

5. Operator of Nonowned Watercraft

With respect to watercraft you do not own that is less than 51 feet long and is not being used to carry persons for a charge, any person is an insured while operating such watercraft with your permission. Any other person or organization responsible for the conduct of such person is also an insured, but only with respect to liability arising out of the operation of the watercraft, and only if no other insurance of any kind is available to that person or organization for this liability.

However, no person or organization is an insured with respect to:

- a. "Bodily injury" to a co-"employee" of the person operating the watercraft; or
- b. "Property damage" to property owned by, rented to, in the charge of or occupied by you or the employer of any person who is an insured under this provision.

6. Additional Insureds When Required By Written Contract, Written Agreement Or Permit

The person(s) or organization(s) identified in Paragraphs a. through f. below are additional insureds when you have agreed, in a written

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contract, written agreement or because of a permit issued by a state or political subdivision, that such person or organization be added as an additional insured on your policy, provided the injury or damage occurs subsequent to the execution of the contract or agreement, or the issuance of the permit.

A person or organization is an additional insured under this provision only for that period of time required by the contract, agreement or permit.

However, no such person or organization is an additional insured under this provision if such person or organization is included as an additional insured by an endorsement issued by us and made a part of this Coverage Part, including all persons or organizations added as additional insureds under the specific additional insured coverage grants in Section F. – Optional Additional Insured Coverages.

a. Vendors

Any person(s) or organization(s) (referred to below as vendor), but only with respect to "bodily injury" or "property damage" arising out of "your products" which are distributed or sold in the regular course of the vendor's business and only if this Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products-completed operations hazard".

- (1) The insurance afforded to the vendor is subject to the following additional exclusions:

This insurance does not apply to:

- (a) "Bodily injury" or "property damage" for which the vendor is obligated to pay damages by reason of the assumption of liability in a contract or agreement. This exclusion does not apply to liability for damages that the vendor would have in the absence of the contract or agreement;
- (b) Any express warranty unauthorized by you;
- (c) Any physical or chemical change in the product made intentionally by the vendor;
- (d) Repackaging, except when unpacked solely for the purpose of inspection, demonstration, testing, or the substitution of parts under instructions from the manufacturer, and then repackaged in the original container;

- (e) Any failure to make such inspections, adjustments, tests or servicing as the vendor has agreed to make or normally undertakes to make in the usual course of business, in connection with the distribution or sale of the products;

- (f) Demonstration, installation, servicing or repair operations, except such operations performed at the vendor's premises in connection with the sale of the product;

- (g) Products which, after distribution or sale by you, have been labeled or relabeled or used as a container, part or ingredient of any other thing or substance by or for the vendor; or

- (h) "Bodily injury" or "property damage" arising out of the sole negligence of the vendor for its own acts or omissions or those of its employees or anyone else acting on its behalf. However, this exclusion does not apply to:

- (i) The exceptions contained in Subparagraphs (d) or (f); or

- (ii) Such inspections, adjustments, tests or servicing as the vendor has agreed to make or normally undertakes to make in the usual course of business, in connection with the distribution or sale of the products.

- (2) This insurance does not apply to any insured person or organization from whom you have acquired such products, or any ingredient, part or container, entering into, accompanying or containing such products.

b. Lessors Of Equipment

- (1) Any person or organization from whom you lease equipment; but only with respect to their liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your maintenance, operation or use of equipment leased to you by such person or organization.

- (2) With respect to the insurance afforded to these additional insureds, this insurance does not apply to any "occurrence" which takes place after you cease to lease that equipment.

c. Lessors Of Land Or Premises

- (1) Any person or organization from whom you lease land or premises, but only with respect to liability arising out of the ownership, maintenance or use of that part of the land or premises leased to you.
- (2) With respect to the insurance afforded to these additional insureds, this insurance does not apply to:
- (a) Any "occurrence" which takes place after you cease to lease that land or be a tenant in that premises; or
- (b) Structural alterations, new construction or demolition operations performed by or on behalf of such person or organization.

d. Architects, Engineers Or Surveyors

- (1) Any architect, engineer, or surveyor, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:
- (a) In connection with your premises; or
- (b) In the performance of your ongoing operations performed by you or on your behalf.
- (2) With respect to the insurance afforded to these additional insureds, the following additional exclusion applies:
- This insurance does not apply to "bodily injury", "property damage" or "personal and advertising injury" arising out of the rendering of or the failure to render any professional services by or for you, including:
- (a) The preparing, approving, or failure to prepare or approve, maps, shop drawings, opinions, reports, surveys, field orders, change orders, designs or drawings and specifications; or
- (b) Supervisory, inspection, architectural or engineering activities.

e. Permits Issued By State Or Political Subdivisions

- (1) Any state or political subdivision, but only with respect to operations performed by you or on your behalf for which the state or political subdivision has issued a permit.
- (2) With respect to the insurance afforded to these additional insureds, this insurance does not apply to:
- (a) "Bodily injury", "property damage" or "personal and advertising injury" arising out of operations performed for the state or municipality; or
- (b) "Bodily injury" or "property damage" included within the "products-completed operations hazard".

f. Any Other Party

- (1) Any other person or organization who is not an insured under Paragraphs **a.** through **e.** above, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:
- (a) In the performance of your ongoing operations;
- (b) In connection with your premises owned by or rented to you; or
- (c) In connection with "your work" and included within the "products-completed operations hazard", but only if
- (i) The written contract or written agreement requires you to provide such coverage to such additional insured; and
- (ii) This Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products-completed operations hazard".
- (2) With respect to the insurance afforded to these additional insureds, this insurance does not apply to:
- "Bodily injury", "property damage" or "personal and advertising injury" arising out of the rendering of, or the failure to render, any professional architectural, engineering or surveying services, including:

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- (a) The preparing, approving, or failure to prepare or approve, maps, shop drawings, opinions, reports, surveys, field orders, change orders, designs or drawings and specifications; or
- (b) Supervisory, inspection, architectural or engineering activities.

The limits of insurance that apply to additional insureds are described in Section **D. – Limits Of Insurance**.

How this insurance applies when other insurance is available to an additional insured is described in the Other Insurance Condition in Section **E. – Liability And Medical Expenses General Conditions**.

No person or organization is an insured with respect to the conduct of any current or past partnership, joint venture or limited liability company that is not shown as a Named Insured in the Declarations.

D. LIABILITY AND MEDICAL EXPENSES LIMITS OF INSURANCE

1. The Most We Will Pay

The Limits of Insurance shown in the Declarations and the rules below fix the most we will pay regardless of the number of:

- a. Insureds;
- b. Claims made or "suits" brought; or
- c. Persons or organizations making claims or bringing "suits".

2. Aggregate Limits

The most we will pay for:

- a. Damages because of "bodily injury" and "property damage" included in the "products-completed operations hazard" is the Products-Completed Operations Aggregate Limit shown in the Declarations.
- b. Damages because of all other "bodily injury", "property damage" or "personal and advertising injury", including medical expenses, is the General Aggregate Limit shown in the Declarations.

This General Aggregate Limit applies separately to each of your "locations" owned by or rented to you.

"Location" means premises involving the same or connecting lots, or premises whose connection is interrupted only by a street, roadway or right-of-way of a railroad.

This General Aggregate limit does not apply to "property damage" to premises while rented to you or temporarily occupied by you with permission of the owner, arising out of fire, lightning or explosion.

3. Each Occurrence Limit

Subject to **2.a.** or **2.b.** above, whichever applies, the most we will pay for the sum of all damages because of all "bodily injury", "property damage" and medical expenses arising out of any one "occurrence" is the Liability and Medical Expenses Limit shown in the Declarations.

The most we will pay for all medical expenses because of "bodily injury" sustained by any one person is the Medical Expenses Limit shown in the Declarations.

4. Personal And Advertising Injury Limit

Subject to **2.b.** above, the most we will pay for the sum of all damages because of all "personal and advertising injury" sustained by any one person or organization is the Personal and Advertising Injury Limit shown in the Declarations.

5. Damage To Premises Rented To You Limit

The Damage To Premises Rented To You Limit is the most we will pay under Business Liability Coverage for damages because of "property damage" to any one premises, while rented to you, or in the case of damage by fire, lightning or explosion, while rented to you or temporarily occupied by you with permission of the owner.

In the case of damage by fire, lightning or explosion, the Damage to Premises Rented To You Limit applies to all damage proximately caused by the same event, whether such damage results from fire, lightning or explosion or any combination of these.

6. How Limits Apply To Additional Insureds

The most we will pay on behalf of a person or organization who is an additional insured under this Coverage Part is the lesser of:

- a. The limits of insurance specified in a written contract, written agreement or permit issued by a state or political subdivision; or
- b. The Limits of Insurance shown in the Declarations.

Such amount shall be a part of and not in addition to the Limits of Insurance shown in the Declarations and described in this Section.

If more than one limit of insurance under this policy and any endorsements attached thereto applies to any claim or "suit", the most we will pay under this policy and the endorsements is the single highest limit of liability of all coverages applicable to such claim or "suit". However, this paragraph does not apply to the Medical Expenses limit set forth in Paragraph 3. above.

The Limits of Insurance of this Coverage Part apply separately to each consecutive annual period and to any remaining period of less than 12 months, starting with the beginning of the policy period shown in the Declarations, unless the policy period is extended after issuance for an additional period of less than 12 months. In that case, the additional period will be deemed part of the last preceding period for purposes of determining the Limits of Insurance.

E. LIABILITY AND MEDICAL EXPENSES GENERAL CONDITIONS

1. Bankruptcy

Bankruptcy or insolvency of the insured or of the insured's estate will not relieve us of our obligations under this Coverage Part.

2. Duties In The Event Of Occurrence, Offense, Claim Or Suit

a. Notice Of Occurrence Or Offense

You or any additional insured must see to it that we are notified as soon as practicable of an "occurrence" or an offense which may result in a claim. To the extent possible, notice should include:

- (1) How, when and where the "occurrence" or offense took place;
- (2) The names and addresses of any injured persons and witnesses; and
- (3) The nature and location of any injury or damage arising out of the "occurrence" or offense.

b. Notice Of Claim

If a claim is made or "suit" is brought against any insured, you or any additional insured must:

- (1) Immediately record the specifics of the claim or "suit" and the date received; and
- (2) Notify us as soon as practicable.

You or any additional insured must see to it that we receive a written notice of the claim or "suit" as soon as practicable.

c. Assistance And Cooperation Of The Insured

You and any other involved insured must:

- (1) Immediately send us copies of any demands, notices, summonses or legal papers received in connection with the claim or "suit";
- (2) Authorize us to obtain records and other information;
- (3) Cooperate with us in the investigation, settlement of the claim or defense against the "suit"; and
- (4) Assist us, upon our request, in the enforcement of any right against any person or organization that may be liable to the insured because of injury or damage to which this insurance may also apply.

d. Obligations At The Insured's Own Cost

No insured will, except at that insured's own cost, voluntarily make a payment, assume any obligation, or incur any expense, other than for first aid, without our consent.

e. Additional Insured's Other Insurance

If we cover a claim or "suit" under this Coverage Part that may also be covered by other insurance available to an additional insured, such additional insured must submit such claim or "suit" to the other insurer for defense and indemnity.

However, this provision does not apply to the extent that you have agreed in a written contract, written agreement or permit that this insurance is primary and non-contributory with the additional insured's own insurance.

f. Knowledge Of An Occurrence, Offense, Claim Or Suit

Paragraphs **a.** and **b.** apply to you or to any additional insured only when such "occurrence", offense, claim or "suit" is known to:

- (1) You or any additional insured that is an individual;
- (2) Any partner, if you or an additional insured is a partnership;
- (3) Any manager, if you or an additional insured is a limited liability company;
- (4) Any "executive officer" or insurance manager, if you or an additional insured is a corporation;
- (5) Any trustee, if you or an additional insured is a trust; or
- (6) Any elected or appointed official, if you or an additional insured is a political subdivision or public entity.

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This Paragraph **f.** applies separately to you and any additional insured.

3. Financial Responsibility Laws

- a.** When this policy is certified as proof of financial responsibility for the future under the provisions of any motor vehicle financial responsibility law, the insurance provided by the policy for "bodily injury" liability and "property damage" liability will comply with the provisions of the law to the extent of the coverage and limits of insurance required by that law.
- b.** With respect to "mobile equipment" to which this insurance applies, we will provide any liability, uninsured motorists, underinsured motorists, no-fault or other coverage required by any motor vehicle law. We will provide the required limits for those coverages.

4. Legal Action Against Us

No person or organization has a right under this Coverage Form:

- a.** To join us as a party or otherwise bring us into a "suit" asking for damages from an insured; or
- b.** To sue us on this Coverage Form unless all of its terms have been fully complied with.

A person or organization may sue us to recover on an agreed settlement or on a final judgment against an insured; but we will not be liable for damages that are not payable under the terms of this insurance or that are in excess of the applicable limit of insurance. An agreed settlement means a settlement and release of liability signed by us, the insured and the claimant or the claimant's legal representative.

5. Separation Of Insureds

Except with respect to the Limits of Insurance, and any rights or duties specifically assigned in this policy to the first Named Insured, this insurance applies:

- a.** As if each Named Insured were the only Named Insured; and
- b.** Separately to each insured against whom a claim is made or "suit" is brought.

6. Representations**a. When You Accept This Policy**

By accepting this policy, you agree:

- (1)** The statements in the Declarations are accurate and complete;
- (2)** Those statements are based upon representations you made to us; and

- (3)** We have issued this policy in reliance upon your representations.

b. Unintentional Failure To Disclose Hazards

If unintentionally you should fail to disclose all hazards relating to the conduct of your business at the inception date of this Coverage Part, we shall not deny any coverage under this Coverage Part because of such failure.

7. Other Insurance

If other valid and collectible insurance is available for a loss we cover under this Coverage Part, our obligations are limited as follows:

a. Primary Insurance

This insurance is primary except when **b.** below applies. If other insurance is also primary, we will share with all that other insurance by the method described in **c.** below.

b. Excess Insurance

This insurance is excess over any of the other insurance, whether primary, excess, contingent or on any other basis:

(1) Your Work

That is Fire, Extended Coverage, Builder's Risk, Installation Risk or similar coverage for "your work";

(2) Premises Rented To You

That is fire, lightning or explosion insurance for premises rented to you or temporarily occupied by you with permission of the owner;

(3) Tenant Liability

That is insurance purchased by you to cover your liability as a tenant for "property damage" to premises rented to you or temporarily occupied by you with permission of the owner;

(4) Aircraft, Auto Or Watercraft

If the loss arises out of the maintenance or use of aircraft, "autos" or watercraft to the extent not subject to Exclusion **g.** of Section **A.** – Coverages.

(5) Property Damage To Borrowed Equipment Or Use Of Elevators

If the loss arises out of "property damage" to borrowed equipment or the use of elevators to the extent not subject to Exclusion **k.** of Section **A.** – Coverages.

BUSINESS LIABILITY COVERAGE FORM**(6) When You Are Added As An Additional Insured To Other Insurance**

That is other insurance available to you covering liability for damages arising out of the premises or operations, or products and completed operations, for which you have been added as an additional insured by that insurance; or

(7) When You Add Others As An Additional Insured To This Insurance

That is other insurance available to an additional insured.

However, the following provisions apply to other insurance available to any person or organization who is an additional insured under this Coverage Part:

(a) Primary Insurance When Required By Contract

This insurance is primary if you have agreed in a written contract, written agreement or permit that this insurance be primary. If other insurance is also primary, we will share with all that other insurance by the method described in **c.** below.

(b) Primary And Non-Contributory To Other Insurance When Required By Contract

If you have agreed in a written contract, written agreement or permit that this insurance is primary and non-contributory with the additional insured's own insurance, this insurance is primary and we will not seek contribution from that other insurance.

Paragraphs **(a)** and **(b)** do not apply to other insurance to which the additional insured has been added as an additional insured.

When this insurance is excess, we will have no duty under this Coverage Part to defend the insured against any "suit" if any other insurer has a duty to defend the insured against that "suit". If no other insurer defends, we will undertake to do so, but we will be entitled to the insured's rights against all those other insurers.

When this insurance is excess over other insurance, we will pay only our share of the amount of the loss, if any, that exceeds the sum of:

- (1)** The total amount that all such other insurance would pay for the loss in the absence of this insurance; and
- (2)** The total of all deductible and self-insured amounts under all that other insurance.

We will share the remaining loss, if any, with any other insurance that is not described in this Excess Insurance provision and was not bought specifically to apply in excess of the Limits of Insurance shown in the Declarations of this Coverage Part.

c. Method Of Sharing

If all the other insurance permits contribution by equal shares, we will follow this method also. Under this approach, each insurer contributes equal amounts until it has paid its applicable limit of insurance or none of the loss remains, whichever comes first.

If any of the other insurance does not permit contribution by equal shares, we will contribute by limits. Under this method, each insurer's share is based on the ratio of its applicable limit of insurance to the total applicable limits of insurance of all insurers.

8. Transfer Of Rights Of Recovery Against Others To Us**a. Transfer Of Rights Of Recovery**

If the insured has rights to recover all or part of any payment, including Supplementary Payments, we have made under this Coverage Part, those rights are transferred to us. The insured must do nothing after loss to impair them. At our request, the insured will bring "suit" or transfer those rights to us and help us enforce them. This condition does not apply to Medical Expenses Coverage.

b. Waiver Of Rights Of Recovery (Waiver Of Subrogation)

If the insured has waived any rights of recovery against any person or organization for all or part of any payment, including Supplementary Payments, we have made under this Coverage Part, we also waive that right, provided the insured waived their rights of recovery against such person or organization in a contract, agreement or permit that was executed prior to the injury or damage.

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If listed or shown as applicable in the Declarations, one or more of the following Optional Additional Insured Coverages also apply. When any of these Optional Additional Insured Coverages apply, Paragraph 6. (Additional Insureds When Required by Written Contract, Written Agreement or Permit) of Section C., Who Is An Insured, does not apply to the person or organization shown in the Declarations. These coverages are subject to the terms and conditions applicable to Business Liability Coverage in this policy, except as provided below:

1. Additional Insured - Designated Person Or Organization

WHO IS AN INSURED under Section C. is amended to include as an additional insured the person(s) or organization(s) shown in the Declarations, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:

- a. In the performance of your ongoing operations; or
- b. In connection with your premises owned by or rented to you.

2. Additional Insured - Managers Or Lessors Of Premises

- a. WHO IS AN INSURED under Section C. is amended to include as an additional insured the person(s) or organization(s) shown in the Declarations as an Additional Insured - Designated Person Or Organization; but only with respect to liability arising out of the ownership, maintenance or use of that part of the premises leased to you and shown in the Declarations.
- b. With respect to the insurance afforded to these additional insureds, the following additional exclusions apply:

This insurance does not apply to:

- (1) Any "occurrence" which takes place after you cease to be a tenant in that premises; or
- (2) Structural alterations, new construction or demolition operations performed by or on behalf of such person or organization.

3. Additional Insured - Grantor Of Franchise

WHO IS AN INSURED under Section C. is amended to include as an additional insured the person(s) or organization(s) shown in the Declarations as an Additional Insured - Grantor Of Franchise, but only with respect to their liability as grantor of franchise to you.

4. Additional Insured - Lessor Of Leased Equipment

- a. WHO IS AN INSURED under Section C. is amended to include as an additional insured the person(s) or organization(s) shown in the Declarations as an Additional Insured – Lessor of Leased Equipment, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your maintenance, operation or use of equipment leased to you by such person(s) or organization(s).
- b. With respect to the insurance afforded to these additional insureds, this insurance does not apply to any "occurrence" which takes place after you cease to lease that equipment.

5. Additional Insured - Owners Or Other Interests From Whom Land Has Been Leased

- a. WHO IS AN INSURED under Section C. is amended to include as an additional insured the person(s) or organization(s) shown in the Declarations as an Additional Insured – Owners Or Other Interests From Whom Land Has Been Leased, but only with respect to liability arising out of the ownership, maintenance or use of that part of the land leased to you and shown in the Declarations.
- b. With respect to the insurance afforded to these additional insureds, the following additional exclusions apply:

This insurance does not apply to:

- (1) Any "occurrence" that takes place after you cease to lease that land; or
- (2) Structural alterations, new construction or demolition operations performed by or on behalf of such person or organization.

6. Additional Insured - State Or Political Subdivision – Permits

- a. WHO IS AN INSURED under Section C. is amended to include as an additional insured the state or political subdivision shown in the Declarations as an Additional

Insured – State Or Political Subdivision - Permits, but only with respect to operations performed by you or on your behalf for which the state or political subdivision has issued a permit.

- b. With respect to the insurance afforded to these additional insureds, the following additional exclusions apply:

This insurance does not apply to:

- (1) "Bodily injury", "property damage" or "personal and advertising injury" arising out of operations performed for the state or municipality; or
- (2) "Bodily injury" or "property damage" included in the "product-completed operations" hazard.

7. Additional Insured – Vendors

- a. WHO IS AN INSURED under Section C. is amended to include as an additional insured the person(s) or organization(s) (referred to below as vendor) shown in the Declarations as an Additional Insured - Vendor, but only with respect to "bodily injury" or "property damage" arising out of "your products" which are distributed or sold in the regular course of the vendor's business and only if this Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products-completed operations hazard".
- b. The insurance afforded to the vendor is subject to the following additional exclusions:

- (1) This insurance does not apply to:
 - (a) "Bodily injury" or "property damage" for which the vendor is obligated to pay damages by reason of the assumption of liability in a contract or agreement. This exclusion does not apply to liability for damages that the vendor would have in the absence of the contract or agreement;
 - (b) Any express warranty unauthorized by you;
 - (c) Any physical or chemical change in the product made intentionally by the vendor;
 - (d) Repackaging, unless unpacked solely for the purpose of inspection, demonstration, testing, or the substitution of parts under instructions from the manufacturer, and then repackaged in the original container;

- (e) Any failure to make such inspections, adjustments, tests or servicing as the vendor has agreed to make or normally undertakes to make in the usual course of business, in connection with the distribution or sale of the products;

- (f) Demonstration, installation, servicing or repair operations, except such operations performed at the vendor's premises in connection with the sale of the product;

- (g) Products which, after distribution or sale by you, have been labeled or relabeled or used as a container, part or ingredient of any other thing or substance by or for the vendor; or

- (h) "Bodily injury" or "property damage" arising out of the sole negligence of the vendor for its own acts or omissions or those of its employees or anyone else acting on its behalf. However, this exclusion does not apply to:

- (i) The exceptions contained in Subparagraphs (d) or (f); or

- (ii) Such inspections, adjustments, tests or servicing as the vendor has agreed to make or normally undertakes to make in the usual course of business, in connection with the distribution or sale of the products.

- (2) This insurance does not apply to any insured person or organization from whom you have acquired such products, or any ingredient, part or container, entering into, accompanying or containing such products.

8. Additional Insured – Controlling Interest

WHO IS AN INSURED under Section C. is amended to include as an additional insured the person(s) or organization(s) shown in the Declarations as an Additional Insured – Controlling Interest, but only with respect to their liability arising out of:

- a. Their financial control of you; or
- b. Premises they own, maintain or control while you lease or occupy these premises.

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This insurance does not apply to structural alterations, new construction and demolition operations performed by or for that person or organization.

9. Additional Insured – Owners, Lessees Or Contractors – Scheduled Person Or Organization

a. WHO IS AN INSURED under Section C. is amended to include as an additional insured the person(s) or organization(s) shown in the Declarations as an Additional Insured – Owner, Lessees Or Contractors, but only with respect to liability for "bodily injury", "property damage" or "personal and advertising injury" caused, in whole or in part, by your acts or omissions or the acts or omissions of those acting on your behalf:

- (1) In the performance of your ongoing operations for the additional insured(s); or
- (2) In connection with "your work" performed for that additional insured and included within the "products-completed operations hazard", but only if this Coverage Part provides coverage for "bodily injury" or "property damage" included within the "products-completed operations hazard".

b. With respect to the insurance afforded to these additional insureds, this insurance does not apply to "bodily injury", "property damage" or "personal an advertising injury" arising out of the rendering of, or the failure to render, any professional architectural, engineering or surveying services, including:

- (1) The preparing, approving, or failure to prepare or approve, maps, shop drawings, opinions, reports, surveys, field orders, change orders, designs or drawings and specifications; or
- (2) Supervisory, inspection, architectural or engineering activities.

10. Additional Insured – Co-Owner Of Insured Premises

WHO IS AN INSURED under Section C. is amended to include as an additional insured the person(s) or Organization(s) shown in the Declarations as an Additional Insured – Co-Owner Of Insured Premises, but only with respect to their liability as co-owner of the premises shown in the Declarations.

The limits of insurance that apply to additional insureds are described in Section D. – Limits Of Insurance.

How this insurance applies when other insurance is available to an additional insured is described in the Other Insurance Condition in Section E. – Liability And Medical Expenses General Conditions.

G. LIABILITY AND MEDICAL EXPENSES DEFINITIONS

1. "Advertisement" means the widespread public dissemination of information or images that has the purpose of inducing the sale of goods, products or services through:

- a. (1) Radio;
- (2) Television;
- (3) Billboard;
- (4) Magazine;
- (5) Newspaper;

b. The Internet, but only that part of a web site that is about goods, products or services for the purposes of inducing the sale of goods, products or services; or

c. Any other publication that is given widespread public distribution.

However, "advertisement" does not include:

a. The design, printed material, information or images contained in, on or upon the packaging or labeling of any goods or products; or

b. An interactive conversation between or among persons through a computer network.

2. "Advertising idea" means any idea for an "advertisement".

3. "Asbestos hazard" means an exposure or threat of exposure to the actual or alleged properties of asbestos and includes the mere presence of asbestos in any form.

4. "Auto" means a land motor vehicle, trailer or semi-trailer designed for travel on public roads, including any attached machinery or equipment. But "auto" does not include "mobile equipment".

5. "Bodily injury" means physical:

- a. Injury;
- b. Sickness; or
- c. Disease

sustained by a person and, if arising out of the above, mental anguish or death at any time.

6. "Coverage territory" means:

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- a. The United States of America (including its territories and possessions), Puerto Rico and Canada;
- b. International waters or airspace, but only if the injury or damage occurs in the course of travel or transportation between any places included in **a.** above;
- c. All other parts of the world if the injury or damage arises out of:
 - (1) Goods or products made or sold by you in the territory described in **a.** above;
 - (2) The activities of a person whose home is in the territory described in **a.** above, but is away for a short time on your business; or
 - (3) "Personal and advertising injury" offenses that take place through the Internet or similar electronic means of communication

provided the insured's responsibility to pay damages is determined in the United States of America (including its territories and possessions), Puerto Rico or Canada, in a "suit" on the merits according to the substantive law in such territory, or in a settlement we agree to.

- 7. "Electronic data" means information, facts or programs:
 - a. Stored as or on;
 - b. Created or used on; or
 - c. Transmitted to or from computer software, including systems and applications software, hard or floppy disks, CD-ROMS, tapes, drives, cells, data processing devices or any other media which are used with electronically controlled equipment.
- 8. "Employee" includes a "leased worker". "Employee" does not include a "temporary worker".
- 9. "Executive officer" means a person holding any of the officer positions created by your charter, constitution, by-laws or any other similar governing document.
- 10. "Hostile fire" means one which becomes uncontrollable or breaks out from where it was intended to be.
- 11. "Impaired property" means tangible property, other than "your product" or "your work", that cannot be used or is less useful because:
 - a. It incorporates "your product" or "your work" that is known or thought to be defective, deficient, inadequate or dangerous; or

- b. You have failed to fulfill the terms of a contract or agreement;

if such property can be restored to use by:

- a. The repair, replacement, adjustment or removal of "your product" or "your work"; or
- b. Your fulfilling the terms of the contract or agreement.

12. "Insured contract" means:

- a. A contract for a lease of premises. However, that portion of the contract for a lease of premises that indemnifies any person or organization for damage by fire, lightning or explosion to premises while rented to you or temporarily occupied by you with permission of the owner is subject to the Damage To Premises Rented To You limit described in Section **D. – Liability and Medical Expenses Limits of Insurance.**
- b. A sidetrack agreement;
- c. Any easement or license agreement, including an easement or license agreement in connection with construction or demolition operations on or within 50 feet of a railroad;
- d. Any obligation, as required by ordinance, to indemnify a municipality, except in connection with work for a municipality;
- e. An elevator maintenance agreement; or
- f. That part of any other contract or agreement pertaining to your business (including an indemnification of a municipality in connection with work performed for a municipality) under which you assume the tort liability of another party to pay for "bodily injury" or "property damage" to a third person or organization, provided the "bodily injury" or "property damage" is caused, in whole or in part, by you or by those acting on your behalf. Tort liability means a liability that would be imposed by law in the absence of any contract or agreement.

Paragraph **f.** includes that part of any contract or agreement that indemnifies a railroad for "bodily injury" or "property damage" arising out of construction or demolition operations within 50 feet of any railroad property and affecting any railroad bridge or trestle, tracks, road-beds, tunnel, underpass or crossing.

However, Paragraph **f.** does not include that part of any contract or agreement:

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- (1) That indemnifies an architect, engineer or surveyor for injury or damage arising out of:
- (a) Preparing, approving or failing to prepare or approve maps, shop drawings, opinions, reports, surveys, field orders, change orders, designs or drawings and specifications; or
 - (b) Giving directions or instructions, or failing to give them, if that is the primary cause of the injury or damage; or
- (2) Under which the insured, if an architect, engineer or surveyor, assumes liability for an injury or damage arising out of the insured's rendering or failure to render professional services, including those listed in (1) above and supervisory, inspection, architectural or engineering activities.
13. "Leased worker" means a person leased to you by a labor leasing firm under an agreement between you and the labor leasing firm, to perform duties related to the conduct of your business. "Leased worker" does not include a "temporary worker".
14. "Loading or unloading" means the handling of property:
- a. After it is moved from the place where it is accepted for movement into or onto an aircraft, watercraft or "auto";
 - b. While it is in or on an aircraft, watercraft or "auto"; or
 - c. While it is being moved from an aircraft, watercraft or "auto" to the place where it is finally delivered;
- but "loading or unloading" does not include the movement of property by means of a mechanical device, other than a hand truck, that is not attached to the aircraft, watercraft or "auto".
15. "Mobile equipment" means any of the following types of land vehicles, including any attached machinery or equipment:
- a. Bulldozers, farm machinery, forklifts and other vehicles designed for use principally off public roads;
 - b. Vehicles maintained for use solely on or next to premises you own or rent;
 - c. Vehicles that travel on crawler treads;
 - d. Vehicles, whether self-propelled or not, on which are permanently mounted:
- (1) Power cranes, shovels, loaders, diggers or drills; or
 - (2) Road construction or resurfacing equipment such as graders, scrapers or rollers;
- e. Vehicles not described in a., b., c., or d. above that are not self-propelled and are maintained primarily to provide mobility to permanently attached equipment of the following types:
- (1) Air compressors, pumps and generators, including spraying, welding, building cleaning, geophysical exploration, lighting and well servicing equipment; or
 - (2) Cherry pickers and similar devices used to raise or lower workers;
- f. Vehicles not described in a., b., c., or d. above maintained primarily for purposes other than the transportation of persons or cargo.
- However, self-propelled vehicles with the following types of permanently attached equipment are not "mobile equipment" but will be considered "autos":
- (1) Equipment, of at least 1,000 pounds gross vehicle weight, designed primarily for:
 - (a) Snow removal;
 - (b) Road maintenance, but not construction or resurfacing; or
 - (c) Street cleaning;
 - (2) Cherry pickers and similar devices mounted on automobile or truck chassis and used to raise or lower workers; and
 - (3) Air compressors, pumps and generators, including spraying, welding, building cleaning, geophysical exploration, lighting and well servicing equipment.
16. "Occurrence" means an accident, including continuous or repeated exposure to substantially the same general harmful conditions.
17. "Personal and advertising injury" means injury, including consequential "bodily injury", arising out of one or more of the following offenses:
- a. False arrest, detention or imprisonment;
 - b. Malicious prosecution;

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- c. The wrongful eviction from, wrongful entry into, or invasion of the right of private occupancy of a room, dwelling or premises that the person occupies, committed by or on behalf of its owner, landlord or lessor;
 - d. Oral, written or electronic publication of material that slanders or libels a person or organization or disparages a person's or organization's goods, products or services;
 - e. Oral, written or electronic publication of material that violates a person's right of privacy;
 - f. Copying, in your "advertisement", a person's or organization's "advertising idea" or style of "advertisement";
 - g. Infringement of copyright, slogan, or title of any literary or artistic work, in your "advertisement"; or
 - h. Discrimination or humiliation that results in injury to the feelings or reputation of a natural person.
- 18.** "Pollutants" means any solid, liquid, gaseous or thermal irritant or contaminant, including smoke, vapor, soot, fumes, acids, alkalis, chemicals and waste. Waste includes materials to be recycled, reconditioned or reclaimed.
- 19.** "Products-completed operations hazard";
- a. Includes all "bodily injury" and "property damage" occurring away from premises you own or rent and arising out of "your product" or "your work" except:
 - (1) Products that are still in your physical possession; or
 - (2) Work that has not yet been completed or abandoned. However, "your work" will be deemed to be completed at the earliest of the following times:
 - (a) When all of the work called for in your contract has been completed.
 - (b) When all of the work to be done at the job site has been completed if your contract calls for work at more than one job site.
 - (c) When that part of the work done at a job site has been put to its intended use by any person or organization other than another contractor or subcontractor working on the same project.
- Work that may need service, maintenance, correction, repair or replacement, but which is otherwise complete, will be treated as completed.
- The "bodily injury" or "property damage" must occur away from premises you own or rent, unless your business includes the selling, handling or distribution of "your product" for consumption on premises you own or rent.
- b. Does not include "bodily injury" or "property damage" arising out of:
 - (1) The transportation of property, unless the injury or damage arises out of a condition in or on a vehicle not owned or operated by you, and that condition was created by the "loading or unloading" of that vehicle by any insured; or
 - (2) The existence of tools, uninstalled equipment or abandoned or unused materials.
- 20.** "Property damage" means:
- a. Physical injury to tangible property, including all resulting loss of use of that property. All such loss of use shall be deemed to occur at the time of the physical injury that caused it; or
 - b. Loss of use of tangible property that is not physically injured. All such loss of use shall be deemed to occur at the time of "occurrence" that caused it.
- As used in this definition, "electronic data" is not tangible property.
- 21.** "Suit" means a civil proceeding in which damages because of "bodily injury", "property damage" or "personal and advertising injury" to which this insurance applies are alleged. "Suit" includes:
- a. An arbitration proceeding in which such damages are claimed and to which the insured must submit or does submit with our consent; or
 - b. Any other alternative dispute resolution proceeding in which such damages are claimed and to which the insured submits with our consent.
- 22.** "Temporary worker" means a person who is furnished to you to substitute for a permanent "employee" on leave or to meet seasonal or short-term workload conditions.
- 23.** "Volunteer worker" means a person who:
- a. Is not your "employee";

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- b. Donates his or her work;
- c. Acts at the direction of and within the scope of duties determined by you; and
- d. Is not paid a fee, salary or other compensation by you or anyone else for their work performed for you.

24. "Your product":

a. Means:

- (1) Any goods or products, other than real property, manufactured, sold, handled, distributed or disposed of by:
 - (a) You;
 - (b) Others trading under your name; or
 - (c) A person or organization whose business or assets you have acquired; and
- (2) Containers (other than vehicles), materials, parts or equipment furnished in connection with such goods or products.

b. Includes:

- (1) Warranties or representations made at any time with respect to the fitness, quality, durability, performance or use of "your product"; and

- (2) The providing of or failure to provide warnings or instructions.

- c. Does not include vending machines or other property rented to or located for the use of others but not sold.

25. "Your work":

a. Means:

- (1) Work or operations performed by you or on your behalf; and
- (2) Materials, parts or equipment furnished in connection with such work or operations.

b. Includes:

- (1) Warranties or representations made at any time with respect to the fitness, quality, durability, performance or use of "your work"; and
- (2) The providing of or failure to provide warnings or instructions.

For Administrative Use Only – Z99999

Supplier Name: Executive Information Services Inc

Actual Contract Number (CustomText4): 20-0095

Department (Location): SS - Info Services

Contract Type: 2 P/P Services

Contract Sub Type (Custom2Code):

Minute Order Date: 10/1/2019

Minute Order Number: 19-334

Master Contract Number (CustomText1): 20-0095

Bid/RFP # (BidRFP): 2019.050P

BPO Number (Custom1Code): Expense Contract

SHIP TO (LocShipTo): SS - Info Services

BILL TO (LocBillTo): SS - Info Services

Project Number (CustomText2):

Chargeable Program Number (ChargeProgram):

Contract Admin (Administrator): Wayne Flynn

Certificate Of Completion

| | |
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| Envelope Id: CA0F03E02FB244809720E8F1A878D8A4 | Status: Completed |
| Subject: Please DocuSign: Washington County Contract 20-0095: Executive Information Services Inc | |
| Source Envelope: | |
| Document Pages: 149 | Signatures: 3 |
| Certificate Pages: 5 | Initials: 0 |
| AutoNav: Enabled | Envelope Originator: |
| Envelopeld Stamping: Enabled | Kittie Kong |
| Time Zone: (UTC-08:00) Pacific Time (US & Canada) | 155 N. First Ave, Suite 270 |
| | MS28 |
| | Hillsboro, OR 97124-3087 |
| | kittie_kong@co.washington.or.us |
| | IP Address: 204.147.152.15 |

Record Tracking

| | | |
|--------------------------------------|---------------------------------|--------------------|
| Status: Original | Holder: Kittie Kong | Location: DocuSign |
| 1/27/2020 3:53:56 PM | kittie_kong@co.washington.or.us | |
| Security Appliance Status: Connected | Pool: StateLocal | |
| Storage Appliance Status: Connected | Pool: Washington County | Location: DocuSign |

Signer Events

Jeff Pugh
 Jpugh@goeis.net
 Executive Vice-President
 Security Level: Email, Account Authentication (None), Authentication

Signature

DocuSigned by:

 64335E59C7CD4C5...
 Signature Adoption: Pre-selected Style
 Using IP Address: 206.191.12.18

Timestamp

Sent: 1/27/2020 4:28:48 PM
 Viewed: 1/27/2020 4:41:28 PM
 Signed: 1/27/2020 4:43:33 PM

Authentication Details

Phone Auth:
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 Result: passed
 Vendor ID: Authenticate
 Type: PhoneAuth
 Performed: 1/27/2020 4:41:11 PM
 Phone: +1 405-219-9082 (recipient-provided)

Electronic Record and Signature Disclosure:
 Accepted: 1/27/2020 4:41:28 PM
 ID: dc113164-2b35-4acb-87a9-43f7cb9f1a07

Gregg Merlihan
 CMerlihan@harriscomputer.com
 Senior Executive Vice President
 Security Level: Email, Account Authentication (None), Authentication

DocuSigned by:


 0A02924E480543C...
 Signature Adoption: Pre-selected Style
 Using IP Address: 173.225.61.12

Sent: 1/27/2020 4:43:37 PM
 Viewed: 1/27/2020 4:56:25 PM
 Signed: 1/27/2020 5:08:27 PM

Authentication Details

Phone Auth:
 Transaction: 7fd035e2-f380-481b-87bd-78f69900fd11
 Result: passed
 Vendor ID: Authenticate
 Type: PhoneAuth
 Performed: 1/27/2020 4:56:05 PM
 Phone: +1 716-472-4793 (recipient-provided)

Electronic Record and Signature Disclosure:
 Accepted: 1/27/2020 4:56:25 PM
 ID: 7318ab69-70b6-4b2e-aafe-e8519812164f

| Signer Events | Signature | Timestamp |
|---|--|--|
| Erin Calvert Erin_Calvert@co.washington.or.us Deputy County Administrator Washington County, Oregon Security Level: Email, Account Authentication (None), Access Code |  Signature Adoption: Pre-selected Style Using IP Address: 204.147.152.5 | Sent: 1/27/2020 5:08:31 PM Viewed: 1/27/2020 7:26:59 PM Signed: 1/27/2020 7:27:39 PM |

Electronic Record and Signature Disclosure:
 Not Offered via DocuSign

| In Person Signer Events | Signature | Timestamp |
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| Editor Delivery Events | Status | Timestamp |
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| Agent Delivery Events | Status | Timestamp |
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| Intermediary Delivery Events | Status | Timestamp |
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| Certified Delivery Events | Status | Timestamp |
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| Carbon Copy Events | Status | Timestamp |
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| Witness Events | Signature | Timestamp |
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| Notary Events | Signature | Timestamp |
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| Envelope Summary Events | Status | Timestamps |
|-------------------------|--------|------------|
|-------------------------|--------|------------|

| | | |
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| Envelope Sent | Hashed/Encrypted | 1/27/2020 5:08:31 PM |
| Certified Delivered | Security Checked | 1/27/2020 7:27:00 PM |
| Signing Complete | Security Checked | 1/27/2020 7:27:39 PM |
| Completed | Security Checked | 1/27/2020 7:27:39 PM |

| Payment Events | Status | Timestamps |
|----------------|--------|------------|
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| Electronic Record and Signature Disclosure |
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Consequences of changing your mind

If you elect to receive required notices and disclosures only in paper format, it will slow the speed at which we can complete certain steps in transactions with you and delivering services to you because we will need first to send the required notices or disclosures to you in paper format, and then wait until we receive back from you your acknowledgment of your receipt of such paper notices or disclosures. Further, you will no longer be able to use the DocuSign system to receive required notices and consents electronically from us or to sign electronically documents from us.

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Unless you tell us otherwise in accordance with the procedures described herein, we will provide electronically to you through the DocuSign system all required notices, disclosures, authorizations, acknowledgements, and other documents that are required to be provided or made available to you during the course of our relationship with you. To reduce the chance of you inadvertently not receiving any notice or disclosure, we prefer to provide all of the required notices and disclosures to you by the same method and to the same address that you have given us. Thus, you can receive all the disclosures and notices electronically or in paper format through the paper mail delivery system. If you do not agree with this process, please let us know as described below. Please also see the paragraph immediately above that describes the consequences of your electing not to receive delivery of the notices and disclosures electronically from us.

How to contact Carahsoft OBO SHI OBO Washington County:

You may contact us to let us know of your changes as to how we may contact you electronically, to request paper copies of certain information from us, and to withdraw your prior consent to receive notices and disclosures electronically as follows:

To contact us by email send messages to: tina_hartmeier@co.washington.or.us

To advise Carahsoft OBO SHI OBO Washington County of your new email address

To let us know of a change in your email address where we should send notices and disclosures electronically to you, you must send an email message to us at tina_hartmeier@co.washington.or.us and in the body of such request you must state: your previous email address, your new email address. We do not require any other information from you to change your email address.

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To request delivery from us of paper copies of the notices and disclosures previously provided by us to you electronically, you must send us an email to tina_hartmeier@co.washington.or.us and in the body of such request you must state your email address, full name, mailing address, and telephone number. We will bill you for any fees at that time, if any.

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- ii. send us an email to tina_hartmeier@co.washington.or.us and in the body of such request you must state your email, full name, mailing address, and telephone number. We do not need any other information from you to withdraw consent.. The consequences of your withdrawing consent for online documents will be that transactions may take a longer time to process..

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