

**AMENDMENT NO. 3 TO AGREEMENT  
BETWEEN THE COUNTY OF SAN MATEO AND  
CAPITA TECHNOLOGIES, INC.**

THIS AMENDMENT TO THE AGREEMENT, entered into this \_\_\_\_ day of \_\_\_\_\_, 2015, by and between the COUNTY OF SAN MATEO, hereinafter called "County," and Capita Technologies, Inc., hereinafter called "Contractor";

**W I T N E S S E T H:**

WHEREAS, pursuant to Government Code, Section 31000, County may contract with independent contractors for the furnishing of such services to or for County or any Department thereof;

WHEREAS, the parties entered into an Agreement to provide professional services for the configuration, setup, data migration, integration, and training of the Probation Information Management System (PIMS) on August 6, 2013; and

WHEREAS, the parties wish to amend the Agreement to include additional customizations, interfaces, and migrations for further required configuration enhancements to PIMS, extending the term through June 30, 2017, and increasing the agreement amount by \$1,680,940.27 for a not to exceed amount of \$3,334,851.00.

**NOW, THEREFORE, IT IS HEREBY AGREED BY THE PARTIES HERETO  
AS FOLLOWS:**

**1. The following is added to 1. Exhibits and Attachments, (rev.11/17/2015).**

- Attachment D – Customizations - Work Package Enhancement Details for Work Packages 3 through 7
- Attachment E – Enhancement Details for Interfaces & Migrations

**2. Section 3. Payments of the agreement is amended to read as follows:**

In consideration of the services provided by Contractor in accordance with all terms, conditions and specifications set forth herein and in Exhibit "A" and Exhibit "C," County shall make payment to Contractor based on the rates and in the manner specified in Exhibit "B." The County reserves the right to withhold payment if the County determines that the quantity or quality of the work performed is unacceptable. The County will use this Agreement, Contractor's proposals responses and the County-approved gap analysis specifications as a basis for determining quality and acceptance of work. The County will document the issues, and the details of performance deficiencies as compared to the

specific RFP detailed requirements in the RFP, or by any subsequent design documents approved by the County and Capita, which will supersede the RFP requirements. Within five business days from the reporting of an error or system issue by the County to Contractor, Contractor will respond to County with a reasonable plan and time period in which to correct the reported issue.

In no event shall the County's total fiscal obligation under this Agreement exceed Three Million Three Hundred Thirty Four Thousand Eight Hundred Fifty One Dollars (\$3,334,851.00).

**3. Section 4. Term and Termination of the agreement is amended to read as follows:**

Subject to compliance with all terms and conditions, the term of this Agreement shall be from August 6, 2013 through June 30, 2017.

This Agreement may be terminated by Contractor or by the Chief Information Officer of San Mateo County or his/her designee, in conjunction with approval from the Chief Probation Officer, at any time without a requirement of good cause upon thirty (30) days' written notice to the other party.

In the event of termination, all San Mateo County generated finished or unfinished documents, data, studies, maps, photographs, reports, and materials (hereafter referred to as materials) prepared by Contractor under this Agreement shall become the property of the County and shall be promptly delivered to the County. Upon termination, the Contractor may make and retain a copy of such materials. Subject to availability of funding, Contractor shall be entitled to receive payment for work/services provided prior to termination of the Agreement. Such payment shall be that portion of the full payment which is determined by comparing the work/services completed to the work/services required by the Agreement.

**4. The following is added to the Original Exhibit A, (rev. 11/17/2015).**

After considerable analysis of the County's current systems, and desired future requirements, the County identified gaps needed to enhance their use of Capita Case. These gap requirements have been documented, and Contractor has worked with the County team to understand the needs and to estimate the work requirements and costs of each.

**The scope of work includes the following categories:**

1. Customization of existing Capita Case functions or the development of new functions to be integrated into Capita Case. (See Attachment D)
2. Development of additional interfaces between Capita Case and other internal and external systems. (See Attachment E)
3. Additional data migration support hours for migrating documents. Additional migration help may be required for mapping, extracting, cleansing, or other activities. (See Attachment E)

4. Project Management time to manage the additional scope of work for migrations, interfaces and enhancements, as well as to manage the extended duration of the project as a result of the increased scope.

### **Customization**

Tasks and Deliverables Include:

Tasks:

1. Participate in collaborative requirements & design meetings.
2. Prepare functional/design specifications.
3. Develop new or updated application software.
4. Make changes to the database to support new fields or report views.
5. Prepare new or updated online help and training materials.

Deliverables:

1. Functional/design specification documents.
2. Application software, tested for quality assurance.
3. System documentation, to include:
  - a. New or updated user manuals
  - b. New or updated online help
  - c. New or updated training materials

### **Interfaces**

Interface design, Capita Case mapping, technical collaboration, interface development, QA/testing, ongoing support documentation. And review, support, and bug corrections through the acceptance process up until go live and maintenance begins. There may be a need to add new screen fields and data fields to input data from Agency's systems.

Tasks (for new interfaces):

1. Participate in collaborative interface mapping requirements meetings.
2. Prepare interface specifications.
3. Make changes to the database to support new fields if needed.
4. Develop new interface software.
5. Work with your interface team to receive data, and send data.
6. Update documentation as required.
7. Iteratively test and fix interface issues.
8. Ongoing support for interfaces.

Deliverables:

1. Interface mapping and design specification documents.
2. Interface software, tested for quality assurance.
3. Support documentation
4. Updated user documentation, online manuals if new fields required.

### **Migrations**

Development of new migration programs for documents.

Tasks:

1. Participate in collaborative migration planning meetings.
2. Collaborate on mapping requirements.
3. Train IT team in loading reference tables.
4. Train IT team in loading reference tables.
5. Make changes to the database to support new fields.
6. For new fields, possible changes to: screens, forms, security, reports, workflows, and documentations.
7. Possible need for writing migration business logic.
8. Update all documentation: online, training materials, user manuals for new fields.
9. Develop new migration software for new fields.
10. Collaborate to perform test batch migration runs, and help analyze exception reports, and actions required.
11. Identify performance requirements for migrations for go live.
12. Help create data cleansing scripts if needed.
13. Iteratively Test with small and large runs, and fix migration issues.
14. Create migration plan for go live activities.
15. Ongoing Support for migration issues.

Deliverables:

1. Migration mapping documents
2. Run batch migration runs
3. Gaining acceptance of each Migration Group
4. For new fields deliver work for changing: screens, forms, security, reports, workflows, and documentations.
5. Go Live Plans
6. Run successful migration

The County and Contractor have created a detailed spreadsheet of each enhancement deliverable. This detailed scope of work includes:

The customization deliverables are included in Attachment D, and all other enhancements (i.e. interfaces, migrations, additional services, etc.) are described in Attachment E.

The spreadsheet details each desired enhancement including:

- A description of each individual required deliverable.
- Contractor's time estimate in number of hours needed for completing the work associated with the deliverable.
- The estimated cost to complete and gain customer acceptance of the

individual deliverable.

### **Work Packages Services and Deliverables**

The Work Packages to be delivered are Contractor's Case Enhancements.

"Enhancement" means a change or upgrade to the Capita CASE product that increases its functional capabilities beyond current specifications.

Enhancements are grouped into specific Work Packages:

- Work Package #3 includes deliverables for "Cases"
- Work Package #4 includes deliverables for "Case Assignment & Transfer"
- Work Package #5 includes deliverables for "Detention, Incidents, & Grievances"
- Work Package #6 includes deliverables for "Assessment, Case Plan, Placement, Reports, & Common"
- Work Package #7 includes deliverables for "Supervision & Administration"

Each work package has numerous individual enhancements, which make up the deliverables. The deliverables for each Work Package are included in this Agreement as follows:

Attachment D details the deliverables for each Work Package 3-7.

1. Payment for each Work Package will involve the following five Time and Materials (T&M) milestones:
  1. Delivery of Enhancement Specification Documents: Contractor will prepare a written description of the particular Enhancements. Contractor will invoice for the hours of work performed to deliver the work package specifications.
  2. Specification Acceptance: All parties will have an opportunity to review and agree to the requirements and design that will be developed and implemented. The County will review, provide feedback, and give final approval to these requirements. Contractor will collaborate with the County to gain feedback from County in a timely manner. Contractor anticipates that County will have approximately one to two revisions per deliverable specification. The County will have the final decision as to acceptance of the specifications. Contractor will invoice for hours of work performed to

collaborate with the County and to make any changes necessary for acceptance of the specifications.

3. Delivery of a Software Enhancement: Contractor will deliver the software to the County in order to facilitate the review, testing, and approval of the enhancement by County. Contractor will invoice for the hours of work performed to deliver the Work Package software to County.
4. Acceptance of a Software Enhancement: This is the work that is required of Contractor after it delivers the software enhancement to address any deficiencies with the software before the County will accept it. Contractor will work with the County through one or multiple revisions to review, test, and fix issues, until the County is satisfied and gives acceptance of the enhancement. Contractor will invoice for the hours of work performed to gain customer acceptance of the software deliverable.
5. Enhancement Warranty Period Support: Contractor will provide ongoing support of the Software Enhancement including fixes and changes from the acceptance date throughout the Warranty period and maintenance period. The Warranty period commences as soon as the enhancement is deployed for live production use ('Go-Live') and ends when the Maintenance period begins, ninety (90) days after the Go-Live' of the enhancement. Contractor will invoice monthly for support time for any customizations that have been accepted but need additional support activities through Warranty Period.

Note: If a Work Package Milestone, as defined above, encounters delays including but not limited to, the availability of County subject matter expertise, submission of County-owned deliverables, and delivery of County reviews, caused solely by County of greater than twenty (20) business days, Contractor may bill for the month in which the delay(s) occur for hours of actual work performed to date for that deliverable. The remaining work for the milestone will be paid according to the "Work Delivery Payment Plan." Prior to commencing the work for each milestone, the County and the Contractor will mutually agree to a billing schedule for each milestone.

2. Contractor will be paid \$125/hour for work performed on the Work Package milestones and deliverables defined in item 2 above by the following members of Contractor staff as required: Project Management, Business Analysts, Systems Architects, Database Administrator (DBA), Quality Assurance, developers, and other Contractor staff as assigned.
3. Contractor has estimated the amount of hours and costs associated with each

Work Package as follows:

	<b>Enhancement Work Packages</b>	<b>Total Estimated Hours for: BA, Developer, QA, DBA, Architect</b>	<b>Estimated Hours for Project Management</b>	<b>Total Estimated Hours</b>	<b>Total Estimated Dollars</b>
Work Package 3	Cases	3,128	390	3,518	\$439,716
Work Package 4	Case Assignment & Transfer	257	32	289	\$36,092
Work Package 5	Detention, Incidents, & Grievances	2,227	278	2,505	\$313,090
Work Package 6	Assessment, Case Plan, Placement, Reports, & Common	845	105	951	\$118,834
Work Package 7	Supervision & Administration	1,102	137	1,240	\$154,960
<b>TOTALS</b>		<b>7,559</b>	<b>943</b>	<b>8,502</b>	<b>\$1,062,692</b>

4. County has the ability to make additions, substitutions, or deletions of any deliverables; if County plans to make such a change a mutually agreed upon County Amendment must be executed.
5. Payments: Contractor will bill monthly for hours of work performed and will designate the work package for which the invoiced work has been performed.
6. Contractor will complete all of the deliverables for Work Package #3 through #7. In no event shall the total payment for all services under this Amendment exceed \$1,062,692. The County shall have no obligation to make any payments beyond \$1,062,692. Contractor shall not be obligated to furnish services beyond that amount. When cumulative billings under this contract total seventy-five percent (75%) of \$1,062,692 or \$797,019, Contractor shall give written notification to the County within ten (10) business days. Contractor will stop work if the total for services provided to the County for these Work Packages and other remaining milestone assignments reach **\$1,062,692**. Contractor will not do work beyond the not to exceed amount (\$1,062,692) without authorization from the County.

### **ASSUMPTIONS**

1. The County will prioritize the enhancements and services required.
2. The County will provide written correspondences to authorize Contractor to work on specific deliverables as desired.
3. Contractor will conduct meetings as needed with “The Team” at the County and will write deliverable specifications as needed to assure that the County’s requirements are being reviewed and accepted.
4. The County will provide timely help from Subject Matter Experts and IT staff where applicable.
5. The County will perform testing and acceptance of the enhancements.
6. The resource and time estimates provided by Contractor in this proposal are estimates only and are based upon the information provided by the County, Contractor’s professional expertise and judgment, and the Contractor’s assumptions to manage scope and risk. Contractor will work closely with the County to engage in a workable and effective project with a scope, schedule, and appropriate deliverables to provide the County with its desired outcome. Due to the specific nature of the project and the fact that variables beyond the reasonable control of both Contractor and the County may impact the scheduling and costs of the project, the estimates may vary. Contractor will provide reasonable notice of any changes to estimates, and the County and Contractor shall work together to consider all possible alternatives, including amending the scope and/or deliverables, to allow the project to be delivered on time and within budget. The final decision on changing the scope or funding will be with the County. A formal change control process will followed to manage any such changes.
7. The total enhancement hours and dollars are primarily to be used according to the designated deliverables herein. The County can alter the use of these hours and dollars as needed for any Contractor Case services or offerings. The final decision on changing use of allocated budget will be with the County. A formal change control process will followed to manage any such changes.

3. Original Exhibit B is replaced with Revised Exhibit B, (rev.11/17/2015 ).

MILESTONE	TOTAL COST	MILESTONE PAYMENT
LICENSE FEE  50% Due at signing of Contract	\$336,500.00	\$168,250.00



50% Due at go-live		\$168,250.00
REQUIREMENT ANALYSIS	\$79,200.00	
"As-Is" Workflow Analysis - Due at Milestone completion and County approval		\$26,400.00
"To-Be" Workflow Analysis - Due at Milestone completion and County approval		\$26,400.00
Business Process Reengineering - Due at Milestone completion and County approval		\$26,400.00
NETWORK ASSESSMENT	\$8,800.00	
Due at Milestone completion and County approval		\$8,800.00
INSTALLATION		
Traffic Functionality	\$34,200.06	
50% Due at completion of gap analysis and County approval		\$17,100.03
50% Due at completion of testing and County approval		\$17,100.03
Traffic Change Order	\$56,179.94	
50% Due at completion of gap analysis and County approval		\$28,089.97
50% Due at completion of testing and County approval		\$28,089.97
Active Directory Integration (include \$9,500 for QA)	\$45,600.00	
50% Due at completion of gap analysis and County approval		\$22,800.00
50% Due at completion of testing and County approval		\$22,800.00
Software Install Parameter Setup	\$13,200.00	

	Due at Milestone completion and County approval		\$13,200.00
	Software Install Tasks Required	\$13,200.00	
	Due at Milestone completion and County approval		\$13,200.00
<b>INTERFACES</b> (Payment due at completion of each interface and County approval)		\$352,950.00	
<b>Fixed</b>	<b>Probation System to CA DOJ JCPSS (Juvenile Court Probation Statistical System)</b>		<b>\$17,600.00</b>
<b>T&amp;M</b>	<b>Revenue &amp; Recovery Software (CUBS),expanding to two way interface</b>		<b>\$34,650.00</b>
<b>Fixed</b>	<b>Offenderlink Software</b>		<b>\$34,650.00</b>
<b>Fixed</b>	<b>Drug Testing Vendor</b>		<b>\$17,600.00</b>
<b>Fixed</b>	<b>DMV (Department of Motor Vehicles) CLETS (California Law Enforcement Telecommunications System)</b>		<b>\$17,600.00</b>
<b>Fixed</b>			<b>\$22,000.00</b>
<b>T&amp;M</b>	<b>CE Assessments</b>		<b>\$52,800.00</b>
<b>T&amp;M</b>	<b>CJI</b>		<b>\$52,800.00</b>
<b>T&amp;M</b>	<b>Social Solutions</b>		<b>\$17,700.00</b>
<b>T&amp;M</b>	<b>CopLink</b>		<b>\$17,700.00</b>
<b>T&amp;M</b>	<b>SmartJustice</b>		<b>\$32,450.00</b>
<b>T&amp;M</b>	<b>Okta</b>		<b>\$17,700.00</b>
<b>T&amp;M</b>	<b>BI.com</b>		<b>\$17,700.00</b>
TEST AND SYSTEM VALIDATION		\$35,200.00	
	Due when testing completed and system is scheduled to go-live		\$35,200.00
TRAINING		\$71,000.00	
	50% Due when half the training has been completed		\$35,500.00
	50% Due after all training has been completed and County approval		\$35,500.00
<b>MAINTENANCE</b> (3 Years)		<b>\$369,044.00</b>	
	Due in advance after warranty period		\$369,044.00

<b>MILESTONE TOTAL</b>	<b>\$1,415,074.00</b>	<b>\$1,415,074.00</b>
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<b>TIME AND MATERIAL PAYMENTS</b>		
<b>MIGRATION</b> Billed Monthly: first \$121,000 of work at \$110 per hour, and remainder at \$125 per hour for actual hours completed and County approval	<b>\$244,548.00</b>	<b>\$244,548.00</b>
<b>TRAVEL</b> Billed monthly for actual costs associated with travel and County approval	\$52,160.00	\$52,160.00
<b>PROJECT MANAGEMENT</b> Billed Monthly for work performed.	<b>\$95,025.00</b>	<b>\$95,025.00</b>
<b>TIME AND MATERIALS TOTAL</b>	<b>\$391,733.00</b>	<b>\$391,733.00</b>

<b>OPTIONAL COSTS</b>		
<b>ENHANCEMENT POOL</b> 1,200 hours - Utilized only at County discretion	\$150,000.00	\$150,000.00
<b>Optional Total</b>	<b>\$150,000.00</b>	<b>\$150,000.00</b>

<b>WORK PACKAGES 1-7</b>		
WORK PACKAGES 1-7 (at \$125 per hour)	\$1,319,067.00	
Work Package 1		\$101,375.00
Work Package 2		\$141,000.00
Project Management for Work Packages 1-2		\$14,000.00
<b>Work Package 3 (incl. Project Management)</b>		<b>\$439,716.00</b>
<b>Work Package 4 (incl. Project Management)</b>		<b>\$36,092.00</b>
<b>Work Package 5 (incl. Project Management)</b>		<b>\$313,090.00</b>

<b>Work Package 6 (incl. Project Management)</b>		<b>\$118,834.00</b>
<b>Work Package 7 (incl. Project Management)</b>		<b>\$154,960.00</b>
<b>WORK PACKAGES TOTAL</b>	<b>\$1,319,067.00</b>	<b>\$1,319,067.00</b>

<b>THIRD PARTY COSTS</b>		
SOFTWARE (Payments made to each individual Third Party Vendor)	\$56,977.00	
Microsoft SQL & Microsoft Report Writer Services		\$29,996.00
Aspose Forms Generator		\$7,497.00
Robohelp(Online Help)		\$999.00
Address Validation - Software Clean Address		\$5,400.00
SpellCheck - Spellex		\$3,085.00
GOOGLE Maps		\$10,000.00
Other	\$2,000.00	
Escrow Fees		\$2,000.00
<b>THIRD PARTY TOTAL</b>	<b>\$58,977.00</b>	<b>\$58,977.00</b>

<b>TOTAL CONTRACT AMOUNT</b>	<b>\$3,334,851.00</b>
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5. All other terms and conditions of the agreement dated August 6, 2013, and as amended between the County and Contractor shall remain in full force and effect.

IN WITNESS WHEREOF, the parties hereto, by their duly authorized representatives,  
have affixed their hands.

COUNTY OF SAN MATEO

By: \_\_\_\_\_  
President, Board of Supervisors, San Mateo County

Date: \_\_\_\_\_

ATTEST:

By: \_\_\_\_\_  
Clerk of Said Board

CAPITA TECHNOLOGIES, INC.

  
\_\_\_\_\_  
Contractor's Signature

Date: 10/13/15

ATTACHMENT D - CUSTOMIZATIONS - WORK PACKAGE ENHANCEMENT DETAILS

Work Package 3 - Cases

Gap.ID	HLR ID/Sub.ID	Gap.ID#Sub.ID	Refer Parent	Area	Module	Screen	High Level Requirement Description	Capita's Original Estimate (hours)	Capita's comments	Estimation Status	Capita Updated?	Revised Estimates (hours)	SMC Proposed W.Package
4	0	4#0	N/A	Juvenile	Case	Case Filing	System must allow user to record Alternative Sentence accurately with the following details included: (a)Type of alternative sentence, (b)Status of alternative sentence, and (c)Alternative Sentence completed - Yes/No	40	Alternate sentencing can be added as a case sub type. We need more details to further as to how to track the status, time and completion of the sentencing. If alternate sentencing can be added as a case sub type and tracked through the existing filing screen, no other customization might be needed.	IncludedInOriginal			7
23	1	23#1	23	Adult	Case		System must provide the ability to enter same conditions for multiple cases for the same client, for <u>Conditions of Probation Summary</u> .	see parent	PIMS will be modified to allow for entering the same conditions on different cases.	IncludedInOriginal			3
23	2	23#2	23	Adult	Case		When user adds a second case to the client, system must allow the user to use all conditions of probation, even if the conditions have been previously used on previous cases for the same client.	see parent	PIMS will be modified to allow for entering the same conditions on different cases.	IncludedInOriginal			3
23	3	23#3	23	Adult	Case		When the user records Court Ordered Informal Probation, the system must allow the case to be to record specific Court Ordered Conditions			EstimatedAsNetNew		16	3
23	4	23#4	23	Adult	Case		If the user records "DEJ" for a case, the system must have the ability to record conditions without sustaining charges			EstimatedAsNetNew		4	3
23	5	23#5	23	Adult	Case		The system must automatically change the violation level from Felony to Misdemeanor when the user records the charge status is "Reduced"			IncludedInOriginal	Yes		3
23	N/A	23	23	Adult	Case	Court Order/Conditions of Probation Summary	See Supplement: Conditions of Probation Summary	20	N/A	IncludedInOriginal			3
25	0	25#0	N/A	Adult	Case	Case Filing	System must allow user to record multiple charges in a case.	0	The restriction of one count per case is already removed. The system allows for entering multiple charges on the case. But, the court orders/dispositions are entered at the case level and not for each charge. Assuming that this behavior will not be modified, there will be no additional effort required.	IncludedInOriginal			3
31	1	31#1	31	Juvenile	Case	Arrest Information	System must display Referral Summary as label for the field <u>Arrest/Petition Summary</u> .	8	N/A	IncludedInOriginal			3
31	2	31#2	31	Juvenile	Case		System must display Referral Summary as label for the field <u>Arrest Summary</u> .	see parent	N/A	IncludedInOriginal			3
38	1	38#1	38	Adult	Case	Case Filing	System must allow user to record if the client is in-custody or out-of-custody.	40	Possibly add the flag on the header to indicate if the client is in custody or not. The exact requirement for this need to be further defined. For now, we are assuming that it could be determined from the court order <u>dispositions for the client</u> .	IncludedInOriginal			3
38	2	38#2	38	Adult	Case		System must allow user to view if the client is in-custody or out-of-custody.	see parent	Possibly add the flag on the header to indicate if the client is in custody or not. The exact requirement for this need to be further defined. For now, we are assuming that it could be determined from the court order <u>dispositions for the client</u> .	IncludedInOriginal			6

40	0	40#0	N/A	Adult	Case	Case Summary	System must allow user to sort data by clicking on column headers.	0	The new single sort and multisort feature can be added to those screens that have a lot of records on the summary screens and have a need for sorting. It is not universally applied to all the summary screens on the application. SMC can indicate which screens they would like the sorting and Capita can apply the feature without any additional cost.	IncludedInOriginal			3
43	0	43#0	N/A	Adult	Case	Case Filing	System must allow user to record more than one charge code.	0	The restriction of one count per case is already removed. The system allows for entering multiple charges on the case. But, the court orders/dispositions are entered at the case level and not for each charge. Assuming that this behavior will not be modified, there will be no additional effort required.	IncludedInOriginal			3
47	0	47#0	N/A	Adult	Case	Case Summary	System must display current Case Termination Date to be viewed at Case History Summary Screen in the Case module. This applied to Adult cases only.	24	Modify the existing Case History screen to add termination date for adult cases	IncludedInOriginal			3
48	1	48#1	48	Juvenile	Case	Case Summary	System must require (mandate) user to record Police Record field in the Intake/Referrals Screen.	32	For juvenile intakes, police report number will be required.	IncludedInOriginal			2
48	2	48#2	48	Juvenile	Case		System must allow user to search by Police Report field in Advanced Search screen under Case related section.	see parent	will add Police Report number to the Advanced Search screen.	IncludedInOriginal			2
49	1	49#1	49	Juvenile	Case		System must allow user to generate probation violation petition (technical violation) without an arrest.	see parent	The existing functionality requires an arrest/referral before filing a petition. For Probation Violation, wouldn't the hearings be associated with the original case which would already have a petition? Filing petitions without an arrest or referral cannot be supported with the current database structure and logic.	IncludedInOriginal			7
49	2	49#2	49	Juvenile	Case		System must allow user to schedule court hearing date without an arrest.	see parent	based on the existing database structure, court hearings are tied to a case. For PVNs the court hearing can be created against the existing case on which the violation occurred. If not, the regular appointment screen can be used to create an appointment of type court hearing.  Due to the existing database layout, we cannot support the above customizations, but there are alternative ways as suggested above,	IncludedInOriginal			3
49	3	49#3	49	Juvenile	Case		System must allow user to generate discovery information for the violation. This report includes but is not limited to: court orders, Exhibit B (history of all sustained law violations), referral summary, client demographics, school records, lab results, etc.	see parent	this will be a form template with some of the PVN data from the PVN screen pre-populated on to the form. Additional fields will need to be mapped to the database, so the form can be pre-populated.	IncludedInOriginal			6
49	4	49#4	49	Juvenile	Case		System must allow user to schedule court hearing for out-of-custody probation violation.		court hearings can be scheduled in the case module. For out-of-custody cases where there is no case yet, appointment screen can be used to schedule the court hearing. Need more specifics before we can elaborate on the customization need. At this time, no additional customization is quoted.	IncludedInOriginal	Yes		3
49	5	49#5	49	Juvenile	Case		System must allow user to generate court order associated with hearing (findings and orders).			EstimatedAsNetNew	Yes	0	3
49	6	49#6	49	Juvenile	Case		System must allow user to generate Notice of Court Hearing.			EstimatedAsNetNew	Yes	0	6
49	7	49#7	49	Juvenile	Case		System must allow user to record violations for a client for the probation conditions that are client-specific.	see 888	will add Other as a value in the violations dropdown on the PVN screen. When Other is selected, Specify Other box will display, so the violation can be entered in free text.	IncludedInOriginal			3

49	8	49#8	49	Juvenile	Case		System must allow user to record violations for the standard probation conditions for the client.	see 888	Currently, the violations are not linked to the clients standard probation conditions. Will need to customize the screen to show the standard probation conditions for the client in addition to the violations from the existing	IncludedInOriginal			3
49	9	49#9	49	Juvenile	Case		System must allow user to generate 777 WIC (Probation violation) case to document probation violations in the case history for the client.		Probation violations are currently entered on the PVN screen in PIMS. If those PVNs resulted in a case, they will be displayed on the Case History screen as well. Otherwise, user can enter a juvenile intake record and select the arrest type as Probation Violation and select 777 WIC for the charge code. If PVNs resulted in new charges, they are displayed on the criminal history. The arrest information is pre-populated on the Intake screen. Not clear on the requirement. No customization is quoted since	IncludedInOriginal	Yes		6
49	10	49#10	49	Juvenile	Case		System must allow user to identify the status of each referral. Status includes Probation Violation Notice or New Law Violation.	see 895	Add a status column to the Probation Violation Summary screen. Currently, there is a Violation Resolution dropdown on the detail screen. The status of the violation will be displayed in the summary screen.	IncludedInOriginal			3
49	11	49#11	49	Juvenile	Case		System must allow user to review current conditions of probation for the client to determine if violations have occurred.	see parent	See response to 888	IncludedInOriginal			3
49	12	49#12	49	Juvenile	Case		System must allow user to record multiple violations for a single client on a single petition.			IncludedInOriginal	Yes		3
49	13	49#13	49	Juvenile	Case		System must allow user to identify and record the client's violation to the specific court order.	see parent	See response to #895	IncludedInOriginal			3
49	14	49#14	49	Juvenile	Case		System must generate court hearing date automatically when a probation violation case is entered into the system.	see parent	need more specifics. Since PVN can be entered in multiple places, it might become too complicated to auto generate a court hearing for a PVN. Not recommended for customization.	IncludedInOriginal			3
49	15	49#15	49	Juvenile	Case		System must record the time and the sender when notification letters are dispatched.	see 990	On the PVN screen for Juveniles, add "Parent/Guardian Notified" check box. For adults and juveniles, add Date Notified next to "Client Notified by" field.	IncludedInOriginal			6
49	16	49#16	49	Juvenile	Case		System must notify user of pending court hearings for in-custody clients.	see 990	add a workflow to send an email notification to the staff for the upcoming court hearings. Need more specifics on hearing type, case and the recipients of the workflow alert.	IncludedInOriginal			6
49	N/A	49	49	Juvenile	Case	Case Summary	See Supplement: Probation Violations			EstimatedAsNetNew	Yes		7
56	1	56#1	56	Adult	Case		System must allow user to record and manage Victim Information in a separate screen.	see parent	Depending on the exact requirements and the number of new fields, the existing Victim screen can be modified or a new one can be developed.	IncludedInOriginal			3
56	2	56#2	56	Adult	Case		System must allow user to record details of victim for Victim Information.	see parent	Depending on the exact requirements and the number of new fields, the existing Victim screen can be modified or a new one can be developed.	IncludedInOriginal			3
56	3	56#3	56	Adult	Case		System must not allow user to record victim information that may compromise the identity of the victim.	see parent	If victim type is individual, will remove the SSN field from the screen, if victim type is business, Fex Tax Id No will continue to show the way it is now.	IncludedInOriginal			3
56	4	56#4	56	Adult	Case		System must allow user to record Business Name when the victim type is Business.	see parent	On the Victim Info screen, will move Victim Type radio button to above the name fields. If type is business, display Business Name as a single field, instead of Last, First and Middle name.	IncludedInOriginal			3



56	5	56#5	56	Adult	Case		System must allow user to record and manage information related to Victims of Violent Crime.	see parent	Will add additional fields to track	IncludedInOriginal			3
56	6	56#6	56	Adult	Case		System must allow user to record and manage restraining order information against a client when the victim of violent crime is involved.	see parent	Will add additional fields to track	IncludedInOriginal			3
56	N/A	56	56	Adult	Case	Victims Summary	See Supplement: Adult Victims Summary	60	Depending on the exact requirements and the number of new fields, the existing Victim screen can be modified or a new one can be developed.	IncludedInOriginal			3
60	0	60#0	N/A	Adult	Case	Court Order/Conditions of Probation Summary	System must allow user to track the total number of jail credits through the life of the case for a client.	40	Once the exact requirements are given, the jail credits can be entered on the court order screen or a separate screen and help track for the life of the case.	IncludedInOriginal			3
63	0	63#0	N/A	Adult	Case	Court Order/Conditions of Probation Summary	System must allow user to record start date and end date for a probation condition when necessary.	0	This feature is already implemented	IncludedInOriginal			3
64	0	64#0	N/A	Adult	Case	Conditions of Probation Information	System must allow user to select all Conditions at the same time.	24	Modify the existing Conditions of Probation Information screen to add a "Select All" option that will allow to select all the conditions.	IncludedInOriginal			3
65	N/A	65	23	Adult	Case	Court Order/Conditions of Probation Summary	See Supplement: Conditions of Probation Summary	see parent	Estimates are included in #23 above	IncludedInOriginal			3
68	1	68#1	68	Juvenile	Case	Court Hearing Information	The system must default the Hearing Time to <Current hour>:00	4	Will default the time for the court hearing to 00 minutes	IncludedInOriginal			3
68	2	68#2	68	Juvenile	Case		System must allow the user to edit the Hearing Time.	see parent	See parent	IncludedInOriginal			3
69	N/A	69	49	Juvenile	Case	Court Hearing Info	See Supplement: Probation Violations	see parent	See 49#1, 49#2	IncludedInOriginal			7
71	0	71#0	N/A	Juvenile	Case	Court Hearing Info	System must allow user to schedule one court hearing associated to multiple case numbers.	80	We need more details for this requirement. If the same court hearing is associated with multiple case numbers, how does it impact the court orders? Will there be multiple orders or the same? Not sure how this will impact the rest of the case module functionality, which is tied to a specific case. Not knowing enough details, this is a very rough estimate for the change.	IncludedInOriginal			3
83	0	83#0	N/A	Adult	Case	Court Hearing Information	System must record and display all court case numbers in uppercase for its alphabetic characters. This applies for both Adult and Juvenile divisions.	4	Case number will be displayed in all upper case even if it was entered in lower or mixed case.	IncludedInOriginal			3
84	0	84#0	N/A	Adult	Case	Case Filing	System must allow user to enter more than one offense.	0	The restriction of one count per case is already removed. The system allows for entering multiple charges on the case. But, the court orders/dispositions are entered at the case level and not for each charge. Assuming that this behavior will not be modified, there will be no additional effort required.	IncludedInOriginal			3
89	0	89#0	N/A	Juvenile	Case	Court Order/Conditions of Probation Summary	System must automatically end probation conditions when a case is terminated.	16	At the time of closing or terminating a case, system will be modified to automatically put an inactive date for all the active conditions on the case.	IncludedInOriginal			3
92	0	92#0	N/A	Juvenile	Case	Court Order/Conditions of Probation Summary	System must allow user to create a new court hearing when the user enters a future court date.	16	When Future Court Dates are entered on court order info screen, system will be modified to automatically create future court hearings based on the court date, court room and hearing time.	IncludedInOriginal			3
94	1	94#1	94	Juvenile	Case		System must allow user to record maximum confinement time.	see parent	Can be entered on the Court Order Info Detention Time field	IncludedInOriginal			3
94	2	94#2	94	Juvenile	Case		System must allow user to record the type of probation for a client.	see parent	Court Order Info - Order dropdown can have the different probation orders	IncludedInOriginal			3
94	3	94#3	94	Juvenile	Case		System must allow user to record any time spent by the client in Juvenile Hall.	see parent	Time spent can be calculated from the admit date and time on the Entrance Information screen (under Detention). The common header can be modified to include the time served. - 16	IncludedInOriginal			5
94	4	94#4	94	Juvenile	Case		System must account for the time spent by the client in Juvenile Hall for calculation of time remaining.	see parent	remaining time can be calculated based on the admit date and time and the estimated release date on the Entrance Info screen or from the detention time field on the court order info screen	IncludedInOriginal			5

94	5	94#5	94	Juvenile	Case		System must allow user to update maximum confinement time for a client.	see parent	We might have to develop a separate screen to show the court ordered confinement time, maximum confinement screen, estimated release date - 32	IncludedInOriginal			3
94	6	94#6	94	Juvenile	Case		System must allow user to record in Maximum Confinement Time was court ordered or otherwise	see parent	this can be added to the new screen.	IncludedInOriginal			3
94	N/A	94	94	Juvenile	Case	Court Order/Conditions of Probation Summary	See Supplement: Probation Time	48	See itemized	IncludedInOriginal			3
95	1	95#1	95	Juvenile	Case	Court Order/Conditions of Probation Summary	System must allow user to record status as Admitted for 725 WIC cases.	8	Sealing would be a manual process where upon terminating the DEJ case, user can go and seal the particular case.  11/15/14: DEJ charges are "admitted". After termination/successful completion, DEJ case would be dismissed and ordered sealed. - Sealing would be a manual process where upon terminating the DEJ case, user can go and seal the particular case. -System to allow for "admitted" status for charges 725 WIC and DEJ cases. - Will allow for Admitted as a valid status for court order offenses on the Court Order Info screen. -Work flow to automatically terminate Conditions of probation should be terminated upon successful completion of DEJ case or 725 WIC type cases. - At the time of closing or terminating a case, system will be modified to automatically put an inactive date for all the active	IncludedInOriginal			3
95	2	95#2	95	Juvenile	Case	Court Order/Conditions of Probation Summary	System must allow user to record status as Admitted for DEJ cases.	see parent	N/A	IncludedInOriginal			3
95	3	95#3	95	Juvenile	Case	Court Order/Conditions of Probation Summary	System must terminate the Conditions of Probation for 725 WIC case automatically when case is	see parent	N/A	IncludedInOriginal			3
95	4	95#4	95	Juvenile	Case	Court Order/Conditions of Probation Summary	System must terminate the workflow for DEJ case automatically when case status is changed to Admitted.	see parent	N/A	IncludedInOriginal			3
98	N/A	98	94	Juvenile	Case	Court Order/Conditions of Probation Summary	See Supplement: Probation Time	0	Estimates are included in #94 above	IncludedInOriginal			3
102	0	102#0	N/A	Adult	Case	Court Order Information	The system must allow the user to hide the Findings section of Court Order Screen for Juvenile Business Area	16	Do not display the findings section for Adult cases	IncludedInOriginal			3
107	0	107#0	N/A	Adult	Case	Court Order/Conditions of Probation Summary	Court hearings are often continued. System must have the ability to capture future court dates. SMC - Adult Division only requires the documentation of the next court date (not all continuances). However, if the next court date/hearing is continued, user should have the ability to overwrite the most recent court date. See Capita comments for additional	see Gap.ID 92#1		IncludedInOriginal			3
108	0	108#0	N/A	Adult	Case	Court Order/Conditions of Probation Summary	Probation conditions should be displayed by the date that they were ordered. Users should be able to view the conditions in chronological order. Per 10/09/14 discussion w/Anu, Capita is adding a feature that allows user to click on the column header to sort the data on the screen. This will be in the coming builds. Once this is implemented, the data can be sorted by clicking on the corresponding column headers. Refer also to ID# 40, 108, 127, 128	see Gap.ID 40#1		IncludedInOriginal			3
110	1	110#1	110	Adult	Case	Case Filing	System must allow user to track all court issued warrants for a client.	See parent	See parent	IncludedInOriginal			3
110	2	110#2	110	Adult	Case		System must allow user to track all non-court issued warrants for a client.	see parent	See parent	IncludedInOriginal			3
110	3	110#3	110	Adult	Case	Case Filing	System must allow user to record court initiated warrants and non-court initiated warrants for a client.	see parent	See parent	IncludedInOriginal			3
110	4	110#4	110	Adult	Case	Case Filing	System must allow user to record the status of court initiated warrants and non-court initiated warrants for a client.	see parent	See parent	IncludedInOriginal			3

110	5	110#5	110	Adult	Case	Case Filing	System must track the status of court initiated warrants and non-court initiated warrants for a client.	see parent	See parent	IncludedInOriginal			3
110	6	110#6	110	Adult	Case	Case Filing	System must allow user to associate court initiated warrants and non-court initiated warrants for an adult client to a specific case.	see parent	See parent	IncludedInOriginal			3
110	7	110#7	110	Adult	Case	Case Filing	System must allow the user to associate all court initiated warrants and non-court initiated warrants for the juvenile client to the client record.	see parent	See parent	IncludedInOriginal			3
110	8	110#8	110	Adult	Case	Case Filing	System must allow the user to associate each court initiated warrant and non-court initiated warrant for a juvenile client to the client's specific case.	see parent	See parent	IncludedInOriginal			3
110	9	110#9	110	Adult	Case	Case Filing	System must prominently display when an adult client has an active court initiated warrant and non-court initiated warrant for a case.	see parent	See parent	IncludedInOriginal			6
110	10	110#10	110	Adult	Case	Case Filing	System must prominently display vendor juvenile client has an active court initiated warrant and non-court initiated warrant for a case and/or multiple cases.	see parent	See parent	IncludedInOriginal			6
110	11	110#11	110	Adult	Case	Case Filing	System must allow the user to end the cycle for a particular court initiated warrant and non-court initiated warrant when a warrant is served and the client returns to court.	see parent	See parent	IncludedInOriginal			3
110	12	110#12	110	Adult	Case	Case Filing	System must allow the user to record detailed information about the status of the warrant.	see parent	See parent	IncludedInOriginal			3
110	N/A	110	110	Adult	Case	Case Filing	See Supplement: Warrant Tracking	80	Create a new warrant summary and detail screen within Case module to track the warrant information. Column I has the details of what information is to be tracked. All warrants (including Court Ordered and non-Court Ordered warrants will be entered here by the user). Client status should be updated to show the warrant status when a warrant is added from here.	PendingConfirmation		96	3
121	N/A	121	23	Juvenile	Case	Court Order/Conditions of Probation Summary	See Supplement: Probation Time	0	Estimates are included in #23 above	IncludedInOriginal			3
125	0	125#0	N/A	Juvenile	Case	Court Order/Conditions of Probation Summary	If user selects reduced, system should automatically change the status of the charge from felony to misdemeanor.	0	this is not recommended because the level of the charge (felony, misdemeanor, etc) come from the charge code file and cannot be changed. If the charge is reduced, then user should select the appropriate lesser charge from the charge code finder. No customization recommended.	IncludedInOriginal			3
129	N/A	129	23	Adult	Case	Case Filing	See Supplement: Conditions of Probation Summary	see Gap.ID 89	The document does not have requirement id 129. Estimates are included in #89 above for automatically closing the conditions of probation upon terminating the case.	IncludedInOriginal			3
132	0	132#0	N/A	Juvenile	Case	Court Report Information	System must allow user to filter reports based on division - Adult or Juvenile.	24	Depending on the case type, the court report list will be filtered to only show adult or juvenile reports.	IncludedInOriginal			6
137	1	137#1	137	Adult	Case	Court Report Information	System must calculate Court Report Due Date for Felony reports as due seven (7) calendar days prior to Court Date.	20	Current functionality auto populates the court dates based on the court hearing type. Instead, populate the court report due date based on the offense level (felony or misdemeanor). Felony reports are due 7 calendar days prior to the court date and misdemeanor is 3 days. Take court dark dates into account. If there is one dark date in between, it will be one day before the dark date. If there are multiple charges (felony and misdemeanor), use the highest charge	IncludedInOriginal			3
137	2	137#2	137	Adult	Case		System must calculate Court Report Due Date for Misdemeanor reports as due three (3) calendar days prior to Court Date.	see parent	See parent	IncludedInOriginal			3

137	3	137#3	137	Adult	Case		System must re-calculate Court Report Due Date as one (1) day prior when the original calculated due date falls on a non-working court date.	see parent	See parent	IncludedInOriginal			3
137	4	137#4	137	Adult	Case		System must calculate Court Report Due Date based on the highest level of charge when there are multiple charges (felony and misdemeanor) for the case.	see parent	See parent	IncludedInOriginal			3
137	5	137#5	137	Adult	Case		System must verify that there is atleast one felony or misdemeanor charge for the case when calculating Court Report Due Date.	see parent	See parent	IncludedInOriginal			3
137	6	137#6	137	Adult	Case		System must notify users when the Court Reports are due to be filed in court.	see parent	See parent	IncludedInOriginal			7
146	0	146#0	N/A	Adult	Case	Case Filing	System must allow user to record multiple charges in the same filing.	0	The restriction of one count per case is already removed. The system allows for entering multiple charges on the case. But, the court orders/dispositions are entered at the case level and not for each charge. Assuming that this behavior will not be modified, there will be no additional effort required.	IncludedInOriginal			3
169	1	169#1	169	Adult	Case	Case Filing	System must allow user to record case number originating from Northern Court - Northern Felony (NF) Case Number separately from Superior Court (SC) Case Number.	24	Will need to modify the Filing screen to allow for tracking the lower court case and later updating with the upper court case number and allow to retain both the case numbers. Once the superior court case number is entered, that will be used as the case number and the lower court case number will become the alternate case number.	IncludedInOriginal			3
169	2	169#2	169	Adult	Case		System must allow user to record Superior Court Case Number after a case has been initiated as NF Case.	see parent	See parent	IncludedInOriginal			3
169	3	169#3	169	Adult	Case		System must not remove NF Case Number after SC Case Number has been assigned to the case.	see parent	See parent	IncludedInOriginal			3
169	4	169#4	169	Adult	Case		System must allow user to search cases using NF Case Number.	see parent	See parent	IncludedInOriginal			2
169	5	169#5	169	Adult	Case		System must allow user to initiate a case as Northern Felony Case.	see parent	See parent	IncludedInOriginal			3
170	1	170#1	170	Adult	Case	Case Filing	System must allow user to record special allegations for case history.	32	The requirement is not completely clear. Based on our understanding, will add a separate section to the Filing Information screen and add the special allegations.	IncludedInOriginal			3
170	2	170#2	170	Adult	Case		System must not label special allegations as a count.	see parent	See parent	IncludedInOriginal			3
170	3	170#3	170	Adult	Case		System must display special allegations separately from the counts.	see parent	See parent	IncludedInOriginal			3
171	0	171#0	N/A	Adult	Case	Case Filing	System must display different types of codes i.e Penal code, Welfare & Institution in separate tabs.	0	Different types of charge codes can be entered and maintained in the Charge Codes reference table and are selectable from the finder icon on all the screens that have charge codes. No software change is required.	IncludedInOriginal			3
172	1	172#1	172	Adult	Case	Case Filing	System must not auto-populate Estimated Termination Date based on Case Initiation Date.	0	Will change the Estimated Term Date calculation to depend on start date and not case initiation date. This will be provided at no cost.	IncludedInOriginal			3
172	2	172#2	172	Adult	Case		System must auto-populate Estimated Termination Date based on Start Date.	see parent	See parent	IncludedInOriginal			3
173	1	173#1	173	Adult	Case		System must allow user to record when client is placed on supervised probation or mandatory supervision in San Mateo.	see parent	court order screen ; current functionality	IncludedInOriginal			3
173	2	173#2	173	Adult	Case		System must allow user to record when ICOTS application for a client is Pending Approval and indicating that ICOTS transfer is initiated and case is under review.	see parent	add the corresponding fields to Filing Info screen to track the initiation and pending approval. Also, the pending transfer can be added as a case subtype.	IncludedInOriginal			6
173	3	173#3	173	Adult	Case		System must allow user to update the status of ICOTS application.	see parent	is it the actual application? Will it be a word template? If so, it can be updated on the word document. On the filing info screen, ICOTS case can be updated.	IncludedInOriginal			3
173	4	173#4	173	Adult	Case		System must allow user to record when Transfer Approved when the receiving state has approves ICOTS Transfer Application.	see parent	add to the filing screen	IncludedInOriginal			3

173	5	173#5	173	Adult	Case		System must allow user to record Transfer Denied when receiving state does not approve ICOTS Transfer Application.	see parent	- can be tracked as the end date for case subtype of 'pending transfer'	IncludedInOriginal			3
173	6	173#6	173	Adult	Case		System must allow user to record supervision will continue with San Mateo County when ICOTS Transfer Application is denied.	see parent	- can be added as a new case subtype on filing screen	IncludedInOriginal			3
173	7	173#7	173	Adult	Case		System must allow user to update client information when the client is under out-of-state supervision.	see parent	current functionality	IncludedInOriginal			1
173	8	173#8	173	Adult	Case		System must allow user to record probation violation by the client when under out-of-state supervision.	see parent	current functionality	IncludedInOriginal			7
173	9	173#9	173	Adult	Case		System must display probation violation information for the client when the client is under out-of-state supervision.	see parent	current functionality	IncludedInOriginal			7
173	N/A	173	173	Adult	Case	Case Filing	See Supplement: ICOTS Case	16	See itemized. There is no reference to this requirement on the supplemental document. Not sure what the exact requirement is. There are some customizations for victim screen included in #56, #202, and #203 above.	IncludedInOriginal			3
178	0	178#0	N/A	Adult	Case	Case Filing	System must allow user to edit/update Estimated Termination Date.	0	No change . Currently, Estimated Term Date is auto populated and updateable.	IncludedInOriginal			3
180	0	180#0	N/A	Juvenile	Case	Case Filing	System must not require user to enter count number when the user files petition charges.	16	The Filing Information and Petition Information screens will continue to require count number for filed charges but will be modified to not require a count number for charges that are not filed.	IncludedInOriginal			3
183	0	183#0	N/A	Juvenile	Case	Case Filing	System must allow user to associate the same court case number when filing petition with multiple referrals.	80	For juveniles, the existing Juvenile Petition screens and associated database tables will be modified to allow for attaching multiple arrests/referrals to the same petition which is tied to a specific case number.	IncludedInOriginal			3
185	1	185#1	185	Juvenile	Case	Case Filing	System must display Decision Date as label for the field Petition/SA Decision Date.	8	Will modify to change the labels to Decision Date and Decision on the Petition Info screen	IncludedInOriginal			3
185	2	185#2	185	Juvenile	Case		System must display Decision as label for field SA Disposition.	see parent	See parent	IncludedInOriginal			3
196	1	196#1	196	Juvenile	Case	Seal Case	System must allow user to initiate sealing of record for a juvenile client.	see parent	See parent	IncludedInOriginal			3
196	2	196#2	196	Juvenile	Case	Seal Case	System must allow user to initiate sealing of record for multiple juvenile clients at the same time.	see parent	See parent	IncludedInOriginal			3
196	3	196#3	196	Juvenile	Case	Seal Case	System must maintain traceable log for the status of record sealing for a juvenile client went sealing has been initiated.	see parent	See parent	IncludedInOriginal			3
196	4	196#4	196	Juvenile	Case	Seal Case	System must allow user to view the status of record sealing for a juvenile client.	see parent	See parent	IncludedInOriginal			3
196	5	196#5	196	Juvenile	Case	Seal Case	System must allow user to view the status of record sealing or multiple juvenile clients at the same time.	see parent	See parent	IncludedInOriginal			3
196	6	196#6	196	Juvenile	Case	Seal Case	System must prominently display for the client the status of record sealing.	see parent	See parent	IncludedInOriginal			3
196	7	196#7	196	Juvenile	Case	Seal Case	System must allow user to choose specific records for sealing.	see parent	See parent	IncludedInOriginal			3
196	8	196#8	196	Juvenile	Case	Seal Case	System must allow user to search for records for a juvenile client by status when record sealing has been initiated.	see parent	See parent	IncludedInOriginal			3
196	9	196#9	196	Juvenile	Case	Seal Case	System must allow user to generate report for all the juvenile clients whose records are initiated for sealing process.	see parent	See parent	IncludedInOriginal			3
196	10	196#10	196	Juvenile	Case	Seal Case	System must allow users to generate report for all the juvenile clients by the status of the record initiated for sealing process.	see parent	See parent	IncludedInOriginal			3
196	11	196#11	196	Juvenile	Case	Seal Case	System must allow user to confirm the sealing of records for a juvenile client before performing actual sealing process.	see parent	See parent	IncludedInOriginal			3
196	12	196#12	196	Juvenile	Case	Seal Case	System must maintain traceable log for all the sealed records for a juvenile client.	see parent	See parent	IncludedInOriginal			3

196	13	196#13	196	Juvenile	Case	Seal Case	System must allow user to unseal a juvenile record when the court has ordered for unsealing.	see parent	See parent	IncludedInOriginal			3
196	14	196#14	196	Juvenile	Case	Seal Case	System must allow user to unseal a juvenile record when the ceiling has been done in error.	see parent	See parent	IncludedInOriginal			3
196	15	196#15	196	Juvenile	Case	Seal Case	System must allow the user to record detailed information when unsealing the juvenile record.	see parent	See parent	IncludedInOriginal			3
196	16	196#16	196	Juvenile	Case	Seal Case	System must allow the user with specific rights to access sealed record information.	see parent	See parent	IncludedInOriginal			3
196	17	196#17	196	Juvenile	Case	Seal Case	System must allow user to generate statistical report for sealed records without disclosing any sealed information for a juvenile client.	see parent	See parent	IncludedInOriginal			3
196	18	196#18	196	Juvenile	Case	Seal Case	System must allow user to identify the sealed record is eligible for DEI.	see parent	See parent	IncludedInOriginal			3
196	19	196#19	196	Juvenile	Case	Seal Case	System must allow user to identify specific offenses that are eligible for sealing.	see parent	See parent	IncludedInOriginal			3
196	20	196#20	196	Juvenile	Case	Seal Case	System must flag/mark certain offenses including but not limited to offense type 707 (h).	see parent	See parent	IncludedInOriginal			3
196	21	196#21	196	Juvenile	Case	Seal Case	System must allow user to initiate automatic sealing of record for a juvenile client.	see parent	See parent	IncludedInOriginal			3
196	22	196#22	196	Juvenile	Case	Seal Case	System must allow user to initiate automatic sealing of records for multiple juvenile clients at the same time.	see parent	See parent	IncludedInOriginal			3
196	23	196#23	196	Juvenile	Case	Seal Case	System must not allow user to initiate automatic sealing of record if the juvenile client has any active cases.	see parent	See parent	IncludedInOriginal			3
196	24	196#24	196	Juvenile	Case	Seal Case	System must not allow user to initiate automatic sealing of record if the juvenile client has any 707 (b) offense.	see parent	See parent	IncludedInOriginal			3
196	25	196#25	196	Juvenile	Case	Seal Case	System must allow the user to override an automatic sealing of record for a juvenile client.	see parent	See parent	IncludedInOriginal			3
196	26	196#26	196	Juvenile	Case	Seal Case	System must allow user to seal records for cases that are non-court ordered informal probation cases.	see parent	See parent	IncludedInOriginal			3
196	27	196#27	196	Juvenile	Case	Seal Case	System must allow the user to assign case number two non-court ordered informal probation cases.	see parent	See parent	IncludedInOriginal			3
196	28	196#28	196	Juvenile	Case	Seal Case	System must maintain traceable log for records that are eligible for automatic sealing process.	see parent	See parent	IncludedInOriginal			3
196	29	196#29	196	Juvenile	Case	Seal Case	System must allow user to generate report for records that are eligible for automatic sealing process.	see parent	See parent	IncludedInOriginal			3
196	30	196#30	196	Juvenile	Case	Seal Case	System must notify user when records are eligible for automatic sealing process.	see parent	See parent	IncludedInOriginal			3
196	N/A	196	196	Juvenile	Case	Seal Case	See Supplement: Juvenile Sealing	200	Customization - A new sealing screen will be developed to include the following: Allow for ability to seal multiple clients at a time (criteria to be defined), track and display the status of sealing for each client. Any reports described above will be part of reports customization. Need more specifics from SMC as to what information is sealed - is the sealing at the case level or charge level? What information is sealed - client info, intake, case, supervision, case notes, etc. All sealed data will have corresponding audit records to track the sealing changes  To allow for unsealing records, the following customizations will be done: The existing unsealing screen could be used for the unseal functionality with some possible customizations. This will allow for unsealing cases that are sealed and allow for tracking the reason for unseal and comments.  Currently, sealed records are not accessible from the application. This	IncludedInOriginal	Yes		3

202	N/A	202	56	Adult	Case	Victims Summary	See Supplement: Adult Victims Summary	40	See 56#4, 56#5, 56#6	IncludedInOriginal			3
203	N/A	203	56	Adult	Case	Victims Summary	See Supplement: Adult Victims Summary	see parent	See 56#3	IncludedInOriginal			3
244	0	244#0	N/A	Adult	Case	Case Filing	Potential interface w/JMS. Users want the ability to track all of the client's in-custody credits. Also, per discussion w/Anu, alternative sentencing can be tracked through case filing.			EstimatedAsNetNew	Yes	TBD	3
248	0	248#0	N/A	Adult	Case	Court Hearing Information	System must allow user to sort court hearings by Hearing Date.	0	The sort feature can be applied to Court Hearing/ Court Report Summary screen.	IncludedInOriginal			3
252	N/A	252	56	Adult	Case	Victims Summary	See Supplement: Adult Victims Summary	see parent	There is no reference to this requirement on the supplemental document. Not sure what the exact requirement is. There are some customizations for victim screen included in #56, #202, and #203 above.	IncludedInOriginal			3
264	1	264#1	264	Adult	Case	Case Filing	System must allow user to record the name of the Judge manually when the Judge is a Visiting Judge.	12	Adult Case Filing screen will be modified to allow for updating the judge name. The judge name is automatically populated upon selecting the court room but can be updated.	IncludedInOriginal			3
264	2	264#2	264	Adult	Case	Case Filing	System must allow user to update the name of the Judge manually when the Judge is a Visiting Judge.	see parent	See parent	IncludedInOriginal			3
264	3	264#3	264	Adult	Case	Case Filing	System must reflect change in Adult and Juvenile Business Areas for the Judge's Name when the name is manually entered for Visiting Judge.	see parent	See parent	IncludedInOriginal			3
374	N/A	374	56	Adult	Case	Victims Summary	See Supplement: Adult Victims Summary	0	See responses to item #56	IncludedInOriginal			3
599	1	599#1	599	Juvenile	Case		System must allow user to choose transfer options as ;a. Intra-state (Out-of-County Transfer-In) or ;b. Inter-State (Out-of-State Transfer-In).	see parent	The existing Petition screen allows for tracking inter and intra state transfers.	IncludedInOriginal			3
599	2	599#2	599	Juvenile	Case		System must allow user to accept information including but not limited to Charges, and Disposition from Out-of-County transfers.	see parent	Petition screen allows to track the charges, charge status, date petition filed, county or state of transfer, etc.	IncludedInOriginal			3
599	3	599#3	599	Juvenile	Case		System must identify Out-of-County court case number and San Mateo County court case number as separate identifiers.	see parent	Will add the out-of-county case number on the petition screen	IncludedInOriginal			3
599	4	599#4	599	Juvenile	Case		System must allow multiple referrals to be associated to one court case number when the case is Juvenile case.	see parent	will modify the application to allow for multiple petitions (each associated with a different referral) to be filed on the same court case number.	IncludedInOriginal			3
599	5	599#5	599	Juvenile	Case		System must allow user to record multiple referrals including Out-of-county Agency information.	see parent	current functionality - any number of referrals can be entered from the existing Juvenile Intake screens.	IncludedInOriginal			3
599	6	599#6	599	Juvenile	Case		System must allow user to set up court hearing to determine acceptance of case into the county.	see parent	current functionality	IncludedInOriginal			3
599	7	599#7	599	Juvenile	Case		System must allow user to record the decision of the court hearing for Transfer-In cases.	see parent	current functionality - court disposition screen	IncludedInOriginal			3
599	8	599#8	599	Juvenile	Case		System must allow user to continue the lifecycle of the case from the previous stage at referring agency when the transfer is accepted into the County.	see parent	additional customization to the petition and court order screens. Need to walkthrough the scenarios with SMC before determining the exact changes.	IncludedInOriginal			3
599	9	599#9	599	Juvenile	Case		System must allow user to record additional conditions for supervision when conditions are specific to client and not a standard condition.	see parent	can be entered as part of a free text condition at the end of standard conditions	IncludedInOriginal			3
599	10	599#10	599	Juvenile	Case		System must allow user to record charges filed outside of County of San Mateo.	see parent	we need to find more specifics on this item. For out of county charges, the CJS charges can be used but for out of state charges, we need to make significant modifications to all the places where the charge codes are entered (intake, filing, petition) to allow for free text entry of charge codes. But, with free text entry, these codes cannot be used in reporting.	IncludedInOriginal			3
599	11	599#11	599	Juvenile	Case		System must allow user to record if charges filed outside of County of San Mateo were sustained.	see parent	once #10 is implemented, 11 will fall in place.	IncludedInOriginal			3
599	12	599#12	599	Juvenile	Case		System must allow user to record the decision of ISM when accepting client into juvenile hall.	see parent	This could be added as a dropdown on the entrance information screen	IncludedInOriginal			3

599	13	599#13	599	Juvenile	Case		System must allow user to intake the client into the hall by entering only the mandatory information for intake.	see parent	current functionality - once all the required fields are entered, user can save the intake and admit the juvenile.	IncludedInOriginal			3
599	14	599#14	599	Juvenile	Case		System must allow user to record additional information for the client after booking into the juvenile hall.	see parent	there is lot of functionality in Detention module that can be tracked after the juvenile is admitted.	IncludedInOriginal			3
599	15	599#15	599	Juvenile	Case		System must notify user when the status of "transfer-in" case is pending.	see parent	need to know the exact requirements for workflow process to be generated.	IncludedInOriginal			3
599	16	599#16	599	Juvenile	Case		System must allow user to review "transfer-in" case.	see parent	depending on the access rights, user can view or update the case. Also, depending on where the case is, certain screens can be entered or updated.	IncludedInOriginal			3
599	17	599#17	599	Juvenile	Case		System must allow user to assign "transfer-in" case to other users contingent on the type of case.	see parent	case assignment in PIMS is at the client level and not case level. Depending on the cases, a client can have a primary PO and other POs assigned to them at the same time. So, the client can be assigned a secondary PO to handle the transfer-in case.	IncludedInOriginal			3
599	N/A	599	599	Juvenile	Case	Intake Assignment Information	See Supplement: Transfer-In	160	See itemized	IncludedInOriginal			3
633	N/A	633	599	Juvenile	Case	Intake Information	See Supplement: Transfer-In	20	See 599#12 to 599#17	IncludedInOriginal			3
639	0	639#0	N/A	Adult	Case	Intake Assignment Information	Duplicate. See ID 169	See parent	See parent	IncludedInOriginal			Closed
647	N/A	647	49	Detention	Case	Intake Summary	See Supplement: Probation Violations	See parent	See parent	IncludedInOriginal			7
657	N/A	657	599	Juvenile	Case	Arrest Information	See Supplement: Transfer-In	0	See responses to item #s 599 and 633	IncludedInOriginal			3
673	1	673#1	673	Adult	Case		LOS assigns client to SPO	see parent	current functionality	IncludedInOriginal			4
673	2	673#2	673	Adult	Case		SPO needs to delegate one of the following tasks to a PO in his/her unit: court report, court officer, DA file clipping, summarily admit probation orientation.	see parent	court reports can be assigned to a PO on the court report screen. The current point system will be customized to associate points with Court reports. Add a new field to display on the court report screens and show the default points associated with the court report. Certain users will have the ability to overwrite depending on the type of case. Not clear on the other requirements for court officer, DA file clipping, etc. and if there are any points associated with the tasks other than the court reports. No customization effort is quoted as the requirement is not clear.	IncludedInOriginal			4
673	3	673#3	673	Adult	Case		LOS documents the court report information.	see parent	this can be tracked on the court report screen.	IncludedInOriginal			3
673	4	673#4	673	Adult	Case		System needs to display which POs are ineligible for assignment due to scheduled/unscheduled leave.	see parent	need to customize the app to allow for tracking the scheduled and unscheduled PO leaves. Case assignment screens need to take the leaves into consideration based on the rules provided by SMC.	IncludedInOriginal			4
673	5	673#5	673	Adult	Case		System needs to display which PO has the least number of points.	see parent	current functionality. CAT screens show the PO caseload points next to the PO names.	IncludedInOriginal			4
673	6	673#6	673	Adult	Case		Task is assigned to PO with the least number of points in the current month and who is eligible to receive a task assignment.	see parent	the values are displayed in the dropdown. SPO can chose the PO based on the points. It is not an automatic assignment process.	IncludedInOriginal			4
673	7	673#7	673	Adult	Case		SPO notifies PO of new assignment.	see parent	once a client is assigned to a PO, there is an alert notification. - current functionality.	IncludedInOriginal			4
673	N/A	673	673	Adult	Case	Court Report Information	See Supplement: Adult Weighted Caseload	32	See itemized	IncludedInOriginal			4
674	N/A	674	673	Adult	Case	Employee Appointment Summary	See Supplement: Adult Weighted Caseload	60	See 673#4 to 673#7	IncludedInOriginal			4
675	1	675#1	675	Adult	Case	Court Report Information	System must notify users when reports are due.	0	Can create a workflow when a court report record is created.	IncludedInOriginal	Yes		6



675	2	675#2	675	Adult	Case		System must allow users to view Report Due Date and Date Filed in Court together for comparison.	see parent	Court report screen has court report due date and court report sent date along with the actual court date. No changes needed.	IncludedInOriginal			3
873	N/A	873	49	Juvenile	Case	Criminal History	See Supplement: Probation Violations	see Gap.ID 49#9	See 49#9	IncludedInOriginal			7
884	N/A	884	49	Juvenile	Case	Probation Violation Information	See Supplement: Probation Violations	see 49#4	See 49#4	IncludedInOriginal			7
888	N/A	888	49	Juvenile	Case	Prob. Vio Info/Technical Vio	See Supplement: Probation Violations	40	See 49#7, 49#8	IncludedInOriginal			7
893	N/A	893	49	Juvenile	Case	Probation violation	See Supplement: Probation Violations	24	See 49#3	IncludedInOriginal			7
895	N/A	895	49	Juvenile	Case	Probation violation	See Supplement: Probation Violations	12	See 49#10	IncludedInOriginal			7
912	N/A	912	49	Juvenile	Case	Probation Violation	See Supplement: Probation Violations	see parent	See 49#11	IncludedInOriginal			7
919	N/A	919	49	Juvenile	Case	Probation Violation Information	See Supplement: Probation Violations	0	See 49#14	IncludedInOriginal			7
956	N/A	956	49	Juvenile	Case	Probation violation	See Supplement: Probation Violations	see parent	See 49#13	IncludedInOriginal			7
957	0	957#0	N/A	Juvenile	Case	Probation violation	Tied to ID 884	see Gap.ID 884		IncludedInOriginal			7
984	0	984#0	N/A	Juvenile	Case	Probation Violation Information	See ID 884	See parent	See parent	IncludedInOriginal			7
990	N/A	990	49	Juvenile	Case	Probation Violation Information	See Supplement: Probation Violations	24	See 49#15, 49#16	IncludedInOriginal			7
993	0	993#0	N/A	Juvenile	Case	Probation Violation Information	See ID 884	See parent	See parent	IncludedInOriginal			7
994	N/A	994	49	Juvenile	Case	Probation Violation Information	See Supplement: Probation Violations	0	See response to #895 above	IncludedInOriginal			7
1047	1	1047#1	1047	Adult	Case	Court Hearing Information	System must allow user to schedule a probation violation arraignment without mandating the name and other details of the Judge.	0	Judge name is not required, it is associated with the court room. Since the courtroom is not known at the time of setting up the hearing, a Probation Violation related court room will be added to the court depts reference codes table. User can then update with the actual court room once it is known. This needs to be done before entering the court order. Once the court order is entered, court hearing record cannot	IncludedInOriginal			3
1047	2	1047#2	1047	Adult	Case		System must allow user to record details for an upcoming probation violation arraignment without mandating the details of the Judge.	see parent	N/A	IncludedInOriginal			3
1048	0	1048	173	Adult	Case		Duplicate. See Gap.ID 173	see parent		IncludedInOriginal			Closed
1049	N/A	1049	173	Juvenile	Case	Search Information	See Supplement: ICOTS Case		No corresponding req id in the supplemental document	IncludedInOriginal	Yes		3
1057	0	1057#0	N/A	Adult	Case	Court Hearing/Court Report Summary	System must restrict user to enter only current and future dates for the field Report Sent Date.	4	Report sent date cannot be in the future. We will add edit checks to make sure it is not before the court report ordered date. Requirement cannot be supported.	PendingConfirmation			3

1060	1	1060#1	1060	Juvenile	Case		System must apply payment first to the fine-only violations in a citation.	See parent	Order of Precedence: Based on the current functionality, the payment summary screen shows all the payments. The detail screen is applicable to a specific citation and payments entered there are applicable to the specific payment. The above customization is not recommended as it will require significant change to the current structure. We can add the citation type, fine amount, due date, etc to the payment summary screen, so user can manually select the correct citation to apply the payment to.	IncludedInOriginal			3
1060	2	1060#2	1060	Juvenile	Case		System must apply payment to fine+correctable violations after all fine-only violations are paid completely.	See parent	N/A	IncludedInOriginal			3
1060	3	1060#3	1060	Juvenile	Case		System must apply payment to the correctable violations after all fine-only violations and fine+correctable violations are paid completely.	See parent	N/A	IncludedInOriginal			3
1060	4	1060#4	1060	Juvenile	Case		System must apply payment to the violation with the highest fine when multiple fine+correctable violations are present in a citation and due date is same for all fine+correctable violation.	See parent	N/A	IncludedInOriginal			3
1060	5	1060#5	1060	Juvenile	Case		System must apply payment to the violation with the highest fine when multiple fine-only violations are present in a citation and due date is same for all fine-only violations.	See parent	N/A	IncludedInOriginal			3
1060	6	1060#6	1060	Juvenile	Case		System must apply payment to the violation with the nearest due date first when multiple fine+correctable violations are present in the citation.	See parent	N/A	IncludedInOriginal			3
1060	7	1060#7	1060	Juvenile	Case		System must apply payment to the violation with the nearest due date first when multiple fine-only violations are present in the citation.	See parent	N/A	IncludedInOriginal			3
1060	8	1060#8	1060	Juvenile	Case		System must apply payment to the violation with the nearest due date when multiple correctable-only violations are present in a citation.	See parent	N/A	IncludedInOriginal			3
1060	9	1060#9	1060	Juvenile	Case		System must apply payment to the citation with the nearest due date when multiple citations are paid at the same time.	See parent	N/A	IncludedInOriginal			3
1060	10	1060#10	1060	Juvenile	Case		System must allow user to record payment for each violation separately.	See parent	current functionality.	IncludedInOriginal			3
1060	11	1060#11	1060	Juvenile	Case		System must allow user to record payment of full fine amount for the citation.	See parent	current functionality.	IncludedInOriginal			3
1060	12	1060#12	1060	Juvenile	Case		System must allow user to record payment of partial fine amount for the citation.	See parent	current functionality.	IncludedInOriginal			3
1060	13	1060#13	1060	Juvenile	Case		System must allow user to record proof of correction for each violation separately.	See parent	currently, this is tracked at the citation level. Customize to record the proof of correction for each violation separately.	IncludedInOriginal			3
1060	14	1060#14	1060	Juvenile	Case		System must allow user to record payment of fine amount for multiple citations at the same time.	See parent	current functionality allows to apply the payment towards each citation. Same check could be applied to multiple citations. In order to apply the payment to multiple citations, user will have to go to each citation and enter the payment amount.	IncludedInOriginal			3
1060	15	1060#15	1060	Juvenile	Case		System must allow user to record payment of fine amount for any combination of fine only and correctable violations in a citation.	See parent	payments are at the citation level and not at the violation level.	IncludedInOriginal			3
1060	16	1060#16	1060	Juvenile	Case		System must allow user to record payment of fine in all combinations of approved modes of payment in a single payment instance.	See parent	need more clarification. Currently, payments can be recurring or one-time. Payment can be made as a check, cash or money order, etc.	IncludedInOriginal			3
1060	17	1060#17	1060	Juvenile	Case		System must allow user to record payment of fine in any of the approved modes of payment.	See parent	Payment can be made as a check, cash or money order, etc.	IncludedInOriginal			3
1060	18	1060#18	1060	Juvenile	Case		System must allow due date for each violations to be changed separately.	See parent	need customization to the citation information screen to track due dates at the violation level instead of the citation.	IncludedInOriginal			3
1060	19	1060#19	1060	Juvenile	Case		System must allow hearings to be scheduled at the citation level as an entirety.	See parent	current functionality	IncludedInOriginal			3

1060	20	1060#20	1060	Juvenile	Case		System must allow multiple violations in all combinations of fine and correctable violations to be associated to a single citation.	See parent	current functionality	IncludedInOriginal			3
1060	21	1060#21	1060	Juvenile	Case		System must calculate distribution of fund for each violation separately.	See parent	need specifics for customization	IncludedInOriginal			3
1060	22	1060#22	1060	Juvenile	Case		System must calculate the initial due date for the citation as an entirety.	See parent	current functionality	IncludedInOriginal			3
1060	23	1060#23	1060	Juvenile	Case		System must close citation when all fines are paid and proof of correction (as applicable) is produced for all violations in the citation within due date.	See parent	user can close the citation from the court order screen	IncludedInOriginal			3
1060	24	1060#24	1060	Juvenile	Case		System must identify the label "correctable only" with reference to violations.	See parent	this attribute can be maintained for each charge at the charge code level.	IncludedInOriginal			3
1060	25	1060#25	1060	Juvenile	Case		System must identify the label "fine and correctable" with reference to violations.	See parent	this attribute can be maintained for each charge at the charge code level.	IncludedInOriginal			3
1060	26	1060#26	1060	Juvenile	Case		System must identify the label "fine only" with reference to violations.	See parent	this attribute can be maintained for each charge at the charge code level.	IncludedInOriginal			3
1060	27	1060#27	1060	Juvenile	Case		System must not associate the label "correctable only" to citations.	See parent	this attribute can be maintained for each charge at the charge code level.	IncludedInOriginal			3
1060	28	1060#28	1060	Juvenile	Case		System must not associate the label "fine and correctable" to citations.	See parent	this attribute can be maintained for each charge at the charge code level.	IncludedInOriginal			3
1060	29	1060#29	1060	Juvenile	Case		System must not associate the label "fine only" to citations.	See parent	this attribute can be maintained for each charge at the charge code level.	IncludedInOriginal			3
1060	30	1060#30	1060	Juvenile	Case		System must record due date for each violations separately.	See parent	need customization to the citation information screen to track due dates at the violation level instead of the citation.	IncludedInOriginal			3
1060	31	1060#31	1060	Juvenile	Case		System must update the conditions of the citation according to the decision of the judge when a disposition has been made for the citation.	See parent	current functionality	IncludedInOriginal			3
1060	32	1060#32	1060	Juvenile	Case		System must not include removed violation for calculation of due date and/or fine amount for the citation.	See parent	currently, the due dates are manually entered by the user and not system calculated.	IncludedInOriginal			3
1060	33	1060#33	1060	Juvenile	Case		System must recalculate due date, fine amount and/or distribution schedule when a violation is removed.	See parent	need more specifics for the calculation of the due dates.	IncludedInOriginal			3
1060	34	1060#34	1060	Juvenile	Case		System must not delete the removed violation. The removed violation must be available to view in case history with reason for removal.	See parent	the removed violation will have a status to indicate that it was removed.	IncludedInOriginal			3
1060	35	1060#35	1060	Juvenile	Case		System must update client information when applicable.	See parent	current functionality	IncludedInOriginal			3
1060	36	1060#36	1060	Juvenile	Case		System must update case information when applicable.	See parent	current functionality	IncludedInOriginal			3
1060	37	1060#37	1060	Juvenile	Case		System must record all actions in case history.	See parent	current functionality	IncludedInOriginal			3
1060	38	1060#38	1060	Juvenile	Case		System must allow user to record "contest" from the client for a citation as an entirety within the due date on the citation.	See parent	current functionality	IncludedInOriginal			3
1060	39	1060#39	1060	Juvenile	Case		System must allow user to record payment within the due date of the violation.	See parent	payment due dates are for the citation and not for each violation	IncludedInOriginal			3
1060	40	1060#40	1060	Juvenile	Case		System must allow user to record the decision of the judge when a disposition has been made for the citation hearing.	See parent	current functionality	IncludedInOriginal			3
1060	41	1060#41	1060	Juvenile	Case		System must allow user to add violations to the citation.	See parent	current functionality	IncludedInOriginal			3
1060	42	1060#42	1060	Juvenile	Case		System must allow user to modify violations in a citation separately.	See parent	current functionality	IncludedInOriginal			3
1060	43	1060#43	1060	Juvenile	Case		System must allow user to remove violations in a citation.	See parent	current functionality	IncludedInOriginal			3
1060	N/A	1060	1060	Juvenile	Case	Traffic Citation Information	See Supplement Citations with Correctable Violations	64	Based on 03/24 meeting, might need some additional restrictions in place when saving the payment record, like the payment cannot exceed a certain amount, etc.	PendingConfirmation			3
1061	1	1061#1	1061	Juvenile	Case		System must allow user to record the decision made by Juvenile Court Judge on "Request to Appeal" for a case.	See parent	current functionality	IncludedInOriginal			3
1061	2	1061#2	1061	Juvenile	Case		System must allow user to schedule a re-hearing for a case.	See parent	use the court hearing screen - current functionality	IncludedInOriginal			3
1061	3	1061#3	1061	Juvenile	Case		System must allow user to search and view all relevant information for re-hearings.	See parent	can be seen on the screens in the case module - current functionality	IncludedInOriginal			3
1061	4	1061#4	1061	Juvenile	Case		System must allow user to record the decision of the Re-hearing.	See parent	court order screen - current functionality	IncludedInOriginal			3
1061	5	1061#5	1061	Juvenile	Case		System must update the status of the case to "Dismissed" when the case has been re-heard and decision has been made.	See parent	depending on the court order, status can be set to closed - current functionality	IncludedInOriginal			3

1061	6	1061#6	1061	Juvenile	Case		System must generate Order for the re-hearing when the decision is recorded.	See parent	use the court hearing screen to schedule the hearing - current functionality	IncludedInOriginal			3
1061	7	1061#7	1061	Juvenile	Case		System must allow user to print the Order for the Re-hearing Decision.	See parent	use the form templates to generate the letter	IncludedInOriginal			6
1061	N/A	1061	1061	Juvenile	Case	Court Hearing Information	See Supplement: Juvenile Court Appeal Process	0	can be entered as a type of court hearing and decision can be entered for the corresponding hearing on the court order screen ; current functionality	IncludedInOriginal			3
1062	1	1062#1	1062	Juvenile	Case		System must allow user to record enhancements on a charge for a client.	See parent	N/A	IncludedInOriginal			3
1062	2	1062#2	1062	Juvenile	Case		System must associate the enhancement on the charge to a specific penal code.	See parent	N/A	IncludedInOriginal			3
1062	3	1062#3	1062	Juvenile	Case		System must not identify enhancements on a charge as separate counts or charges.	See parent	N/A	IncludedInOriginal			3
1062	4	1062#4	1062	Juvenile	Case		System must not limit the number of enhancements that can be associated to a single charge.	See parent	N/A	IncludedInOriginal			3
1062	5	1062#5	1062	Juvenile	Case		System must not change the number of counts when enhancements are added to charges.	See parent	N/A	IncludedInOriginal			3
1062	6	1062#6	1062	Juvenile	Case		System must allow each enhancement on a charge to be "admitted", "sustained" or "dismissed".	See parent	N/A	IncludedInOriginal			3
1062	7	1062#7	1062	Juvenile	Case		System must not roll-up (copy) the disposition on the enhancement of the charge to the disposition on its originating charge.	See parent	N/A	IncludedInOriginal			3
1062	8	1062#8	1062	Juvenile	Case		System must not roll-over (copy) the disposition on the charge to the disposition on the enhancement of the charge.	See parent	N/A	IncludedInOriginal			3
1062	9	1062#9	1062	Juvenile	Case		System must identify disposition on charge and its enhancements as a separate entities.	See parent	N/A	IncludedInOriginal			3
1062	10	1062#10	1062	Juvenile	Case		System must allow user to record "Overt Acts" on a charge for a client.	See parent	N/A	IncludedInOriginal			3
1062	11	1062#11	1062	Juvenile	Case		System must not associate the Overt Act to penal codes.	See parent	N/A	IncludedInOriginal			3
1062	12	1062#12	1062	Juvenile	Case		System must not identify Overt Acts as separate counts or charges.	See parent	N/A	IncludedInOriginal			3
1062	13	1062#13	1062	Juvenile	Case		System must not limit the number of Overt Acts that can be associated to a single charge.	See parent	N/A	IncludedInOriginal			3
1062	14	1062#14	1062	Juvenile	Case		System must not change the number of counts when Overt Acts are added to charges.	See parent	N/A	IncludedInOriginal			3
1062	15	1062#15	1062	Juvenile	Case		System must allow Overt Acts on a charge to be "admitted", "dismissed" or "found true".	See parent	N/A	IncludedInOriginal			3
1062	16	1062#16	1062	Juvenile	Case		System must identify the disposition on Overt Acts separate from its originating charge.	See parent	N/A	IncludedInOriginal			3
1062	N/A	1062	1062	Juvenile	Case	Arrest Information	See Supplement: Charge Enhancements	100	Customization - modify the existing petition screen and court order screens to allow for enhancements and Over Acts. Need more specifics and workflows for these changes.	IncludedInOriginal			3
1070	1	1070#1	1070	Adult	Case		System must distribute payment from correctable-only violations to "correctable-only" distribution bucket.	See parent	See parent	IncludedInOriginal			3
1070	2	1070#2	1070	Adult	Case		System must distribute payment from fine-only violations to "fine-only" distribution bucket.	See parent	See parent	IncludedInOriginal			3
1070	3	1070#3	1070	Adult	Case		System must distribute payment made on a fine+correctable violation to the fine bucket first and then the correctable bucket.	See parent	See parent	IncludedInOriginal			3
1070	4	1070#4	1070	Adult	Case		System must allow fine amount to be changed for each violation separately.	See parent	See parent	IncludedInOriginal			3
1070	5	1070#5	1070	Adult	Case		System must re-calculate distribution of funds for each violation separately when the fine amount is changed.	See parent	See parent	IncludedInOriginal			3
1070	6	1070#6	1070	Adult	Case		System must re-calculate the fine amount for the citation as an entirety when the fine amount is changed for one or more violations in the citation.	See parent	See parent	IncludedInOriginal			3
1070	7	1070#7	1070	Adult	Case		System must re-calculate the due date for each violation separately when the due date is changed.	See parent	See parent	IncludedInOriginal			3

1070	8	1070#8	1070	Adult	Case		System must calculate fine for each violation separately.	See parent	See parent	IncludedInOriginal			3
1070	9	1070#9	1070	Adult	Case		System must generate payment receipt for each citation separately when a payment is made.	See parent	See parent	IncludedInOriginal			3
1070	10	1070#10	1070	Adult	Case		System must automatically pre-populate the base fine for a violation based on the configuration for ES-1.	See parent	See parent	IncludedInOriginal			3
1070	11	1070#11	1070	Adult	Case		System must allow user to configure base fine amount for each violation.	See parent	See parent	IncludedInOriginal			3
1070	12	1070#12	1070	Adult	Case		System must allow user to update/change base fine amount for a violation configuration.	See parent	See parent	IncludedInOriginal			3
1070	13	1070#13	1070	Adult	Case		System must allow user to configure DMV points for each violation.	See parent	See parent	IncludedInOriginal			3
1070	14	1070#14	1070	Adult	Case		System must allow user to update/change DMV points for a violation configuration.	See parent	See parent	IncludedInOriginal			3
1070	15	1070#15	1070	Adult	Case		System must automatically pre-populate the DMV points for a violation based on the configuration when DMV point is associated with it for ES-1.	See parent	See parent	IncludedInOriginal			3
1070	16	1070#16	1070	Adult	Case		System must allow user to configure dollar amounts for each violation as applicable for each of the county's buckets.	See parent	See parent	IncludedInOriginal			3
1070	17	1070#17	1070	Adult	Case		System must allow user to update/change specific dollar amounts for each violation configuration for each of the county's buckets.	See parent	See parent	IncludedInOriginal			3
1070	18	1070#18	1070	Adult	Case		System must allow user to configure percentage of base fine amount for each violation as applicable for each of the state's buckets.	See parent	See parent	IncludedInOriginal			3
1070	19	1070#19	1070	Adult	Case		System must allow user to update/change percentage of base fine amount for each violation configuration for each of the state's buckets.	See parent	See parent	IncludedInOriginal			3
1070	20	1070#20	1070	Adult	Case		System must allow user to configure new buckets for distribution of fine amount.	See parent	See parent	IncludedInOriginal			3
1070	21	1070#21	1070	Adult	Case		System must automatically pre-populate the sum total of the dollar amount for all County's buckets for each violation as a part of ES-2.	See parent	See parent	IncludedInOriginal			3
1070	22	1070#22	1070	Adult	Case		System must automatically pre-populate the sum total of percentage of base fine amount for all state's buckets for each violation as a part of ES-2.	See parent	See parent	IncludedInOriginal			3
1070	23	1070#23	1070	Adult	Case		System must automatically calculate Fine Schedule 2 as the sum total of County bucket amount and state bucket amount.	See parent	See parent	IncludedInOriginal			3
1070	24	1070#24	1070	Adult	Case		System must automatically pre-populate the final total amount for Fine Schedule 2.	See parent	See parent	IncludedInOriginal			3
1070	25	1070#25	1070	Adult	Case		System must automatically calculate Total Bail Amount as the sum total of Fine Schedule 1 And Fine Schedule 2.	See parent	See parent	IncludedInOriginal			3
1070	26	1070#26	1070	Adult	Case		System must automatically pre-populate the Total Bail Amount as calculated.	See parent	See parent	IncludedInOriginal			3
1070	27	1070#27	1070	Adult	Case		System must allow user to add additional fines/fees to a violation at user's discretion.	See parent	See parent	IncludedInOriginal			3
1070	28	1070#28	1070	Adult	Case		System must allow user to reduce fines/fees for a violation at user's discretion.	See parent	See parent	IncludedInOriginal			3
1070	29	1070#29	1070	Adult	Case		System must allow user to record the reason for adjusting fine/fees for a violation.	See parent	See parent	IncludedInOriginal			3
1070	30	1070#30	1070	Adult	Case		System must automatically recalculate Total Bail Amount when user has increased or decreased fees/fines for a violation.	See parent	See parent	IncludedInOriginal			3
1070	31	1070#31	1070	Adult	Case		System must automatically recalculate the distribution of fees/fines to state and county buckets when user has increased or decreased fees/fines for a violation.	See parent	See parent	IncludedInOriginal			3
1070	32	1070#32	1070	Adult	Case		System must allow user to generate and print report for Fine Schedule 1 Configuration.	See parent	See parent	IncludedInOriginal			3
1070	33	1070#33	1070	Adult	Case		System must allow user to generate and print report for Fine Schedule 2 Configuration.	See parent	See parent	IncludedInOriginal			3

1070	34	1070#34	1070	Adult	Case		System must allow users with specific access rights to add/change records in configuration.	See parent	See parent	IncludedInOriginal			3
1070	35	1070#35	1070	Adult	Case		System must allow user to configure and update fine schedule for correctable violations.	See parent	See parent	IncludedInOriginal			3
1070	36	1070#36	1070	Adult	Case		System must allow user to configure and update the distribution buckets for correctable violations fine amount.	See parent	See parent	IncludedInOriginal			3
1070	37	1070#37	1070	Adult	Case		System must automatically pre-populate the calculated fine amount for correctable violations based on configuration.	See parent	See parent	IncludedInOriginal			3
1070	38	1070#38	1070	Adult	Case		System must allow user to configure and update fine schedule for traffic school.	See parent	See parent	IncludedInOriginal			3
1070	39	1070#39	1070	Adult	Case		System must automatically pre-populate the calculated fine amount for traffic school based on configuration.	See parent	See parent	IncludedInOriginal			3
1070	40	1070#40	1070	Adult	Case		System must allow user to configure and update the distribution buckets for traffic school fine amount.	See parent	See parent	IncludedInOriginal			3
1070	41	1070#41	1070	Adult	Case		System must allow user to configure and update fine schedule for returned checks.	See parent	See parent	IncludedInOriginal			3
1070	42	1070#42	1070	Adult	Case		System must allow user to configure and update the distribution buckets for returned checks fine amount.	See parent	See parent	IncludedInOriginal			3
1070	43	1070#43	1070	Adult	Case		System must automatically pre-populate the calculated fine amount for returned checks based on configuration.	See parent	See parent	IncludedInOriginal			3
1070	44	1070#44	1070	Adult	Case		System must allow user to configure and update fine schedule for fine-only violations.	See parent	See parent	IncludedInOriginal			3
1070	45	1070#45	1070	Adult	Case		System must allow user to configure and update the state and county distribution buckets for fine-only violations.	See parent	See parent	IncludedInOriginal			3
1070	46	1070#46	1070	Adult	Case		System must automatically pre-populate the calculated fine amount for fine-only violations based on configuration.	See parent	See parent	IncludedInOriginal			3
1070	47	1070#47	1070	Adult	Case		System must allow user to record a citation as either fine-only citation, correctable citation or fine-only + correctable citation.	See parent	See parent	IncludedInOriginal			3
1070	48	1070#48	1070	Adult	Case		System must allow user to view breakdown of Total Bail Amount.	See parent	See parent	IncludedInOriginal			3
1070	49	1070#49	1070	Adult	Case		System must maintain traceable log for all updates made to configuration related to fine schedule and distribution buckets.	See parent	See parent	IncludedInOriginal			3
1070	50	1070#50	1070	Adult	Case		System must allow user to balance the drawer physically before closing daily batch.	See parent	See parent	IncludedInOriginal			3
1070	51	1070#51	1070	Adult	Case		System must allow user to generate report and print all payments made for that day before closing daily batch.	See parent	See parent	IncludedInOriginal			6
1070	52	1070#52	1070	Adult	Case		System must allow user to record drawer contents before recording closing of daily batch.	See parent	See parent	IncludedInOriginal			3
1070	53	1070#53	1070	Adult	Case		System must generate report when daily batch is closed.	See parent	See parent	IncludedInOriginal			6
1070	54	1070#54	1070	Adult	Case		System must allow user to close daily batch.	See parent	See parent	IncludedInOriginal			3
1070	55	1070#55	1070	Adult	Case		System must record all transactions in the following batch once the daily.	See parent	See parent	IncludedInOriginal			3
1070	56	1070#56	1070	Adult	Case		System must allow user to record any discrepancy noticed when closing daily batch.	See parent	See parent	IncludedInOriginal			3
1070	57	1070#57	1070	Adult	Case		System must not allow user to close daily batch when any discrepancy is found.	See parent	See parent	IncludedInOriginal			3
1070	58	1070#58	1070	Adult	Case		System must allow the user to close daily batch when the discrepancy cannot be resolved and allow user to record reason for non-resolution.	See parent	See parent	IncludedInOriginal			3
1070	59	1070#59	1070	Adult	Case		System must require authorization of supervisor to close daily batch when there is a non-resolved discrepancy.	See parent	See parent	IncludedInOriginal			3
1070	60	1070#60	1070	Adult	Case		System must allow user to correct any discrepancy after the daily batch is closed.	See parent	See parent	IncludedInOriginal			3

1070	61	1070#61	1070	Adult	Case		System must allow user to generate and print report for non-resolved discrepancies.	See parent	See parent	IncludedInOriginal			6
1070	62	1070#62	1070	Adult	Case		System must allow user to generate and print report for resolved discrepancies.	See parent	See parent	IncludedInOriginal			6
1070	63	1070#63	1070	Adult	Case		System must automatically recalculate Total Bail Amount when payment reconciliation is initiated.	See parent	See parent	IncludedInOriginal			3
1070	64	1070#64	1070	Adult	Case		System must automatically recalculate fine distribution for both state and county buckets when payment reconciliation is initiated.	See parent	See parent	IncludedInOriginal			3
1070	65	1070#65	1070	Adult	Case		System must allow user to initiate payment reconciliation when a discrepancy is resolved.	See parent	See parent	IncludedInOriginal			3
1070	66	1070#66	1070	Adult	Case		System must maintain non-editable traceable log for all discrepancies, adjustments, non-resolution and payment reconciliation.	See parent	See parent	IncludedInOriginal			3
1070	67	1070#67	1070	Adult	Case		System must not delete/overwrite reports that were generated just after the closing of daily batch.	See parent	See parent	IncludedInOriginal			3
1070	68	1070#68	1070	Adult	Case		System must generate new report after completion of payment reconciliation and flagging the records that were affected by payment reconciliation.	See parent	See parent	IncludedInOriginal			6
1070	69	1070#69	1070	Adult	Case		System must allow user to generate and print report after payment reconciliation is complete.	See parent	See parent	IncludedInOriginal			6
1070	70	1070#70	1070	Adult	Case		System must generate receipt after payment is received from the client.	See parent	See parent	IncludedInOriginal			3
1070	71	1070#71	1070	Adult	Case		System must allow user to print receipt for payment received from client.	See parent	See parent	IncludedInOriginal			3
1070	72	1070#72	1070	Adult	Case		System must allow user to edit all fields for a payment record when Payment Reconciliation is initiated.	See parent	See parent	IncludedInOriginal			3
1070	73	1070#73	1070	Adult	Case		System must generate a new receipt with new receipt number for a payment record when payment reconciliation is complete.	See parent	See parent	IncludedInOriginal			3
1070	74	1070#74	1070	Adult	Case		System must not delete or overwrite the previous receipt for a payment record when Payment Reconciliation is complete.	See parent	See parent	IncludedInOriginal			3
1070	75	1070#75	1070	Adult	Case		System must allow user to view and print the voided receipt.	See parent	See parent	IncludedInOriginal			3
1070	76	1070#76	1070	Adult	Case		System must automatically void the previous receipt for a payment record when Payment Reconciliation is complete.	See parent	See parent	IncludedInOriginal			3
1070	77	1070#77	1070	Adult	Case		System must continue to display void and new receipt in payment history when a record is updated as a result of Payment Reconciliation.	See parent	See parent	IncludedInOriginal			3
1070	78	1070#78	1070	Adult	Case		System must allow user to record detailed information when a check is bounced for a payment made by the client.	See parent	See parent	IncludedInOriginal			3
1070	79	1070#79	1070	Adult	Case		System must notify user all the cases/payments related to the bounced check when the user marks check payment as bounced.	See parent	See parent	IncludedInOriginal			3
1070	80	1070#80	1070	Adult	Case		System must automatically apply the fine related to the bounced check when the user marks check payment as bounced.	See parent	See parent	IncludedInOriginal			3
1070	81	1070#81	1070	Adult	Case		System must automatically recalculate the Total Bail Amount when any new fines are applied to the case and/or client.	See parent	See parent	IncludedInOriginal			3
1070	82	1070#82	1070	Adult	Case		System must automatically void all payments for all the case/client records made by a bounced check when the user marks check payment as bounced.	See parent	See parent	IncludedInOriginal			3
1070	83	1070#83	1070	Adult	Case		System must notify user on all the void payments with detailed information on all the cases/clients when the user marks a check payment as bounced.	See parent	See parent	IncludedInOriginal			3
1070	84	1070#84	1070	Adult	Case		System must apply bounced check return fee on the oldest open citation when there is more than one case/citation the payment is made with the same check.	See parent	See parent	IncludedInOriginal			3

1070	85	1070#85	1070	Adult	Case		System must automatically void all payments associated with that payment when payment reconciliation is complete for that record.	See parent	See parent	IncludedInOriginal			3
1070	86	1070#86	1070	Adult	Case		System must display voided amount as negative and/or in parenthesis for that payment.	See parent	See parent	IncludedInOriginal			3
1070	N/A	1070	1070	Adult	Case	Traffic Payment Summary	See Supplement: Total Bail amount and Payment Reconciliation	200	Refer to Total Bail Amount and Payment Reconciliation 02192015 document for details. Due to the large size of the supplemental document, the details could not be embedded here. Total Bail Amount: Payment distribution will be based on the different types of violations. These will be maintained in separate tables and will be tied in to the charge codes or violations. It is our assumption that if a client has multiple payments, the payments will be applied manually towards different citations and this process will not be automated. With any updates to the fine amounts, the distribution will be changed automatically. Fines on each violation will be tracked separately. If there are any DMV points associated with the violations, they will be tied in to the violation and tracked. These can be updated by the user. Fund allocation, percentages will be calculated for each county. Total bail amount will be calculated as sum of the fine schedules. Will need to add additional screen to show the fund distribution and total	IncludedInOriginal			3
1071	1	1071#1	1071	Juvenile	Case		System must allow user to record disposition on event before the actual scheduled event occurs.	See parent	court dispositions can only be entered after the court hearing, not before. Cannot support this requirement	IncludedInOriginal			3
1071	2	1071#2	1071	Juvenile	Case		System must allow user to record disposition on a citation at the hearing.	See parent	current functionality	IncludedInOriginal			3
1071	3	1071#3	1071	Juvenile	Case		System must allow user to record disposition information for each violation separately in a citation.	See parent	the status of the violation, fine amount and reason are tracked separately for each violation.	IncludedInOriginal			3
1071	4	1071#4	1071	Juvenile	Case		System must allow user to record orders and/or conditions for the citation as a part of disposition information.	See parent	current functionality	IncludedInOriginal			3
1071	5	1071#5	1071	Juvenile	Case		System must display prominently the disposed events as opposed to the yet-to-be disposed events in the calendar.	See parent	not clear on the requirement. Court hearings are all displayed in chronological order and so are the court orders. Court orders cannot be entered for future hearings.	IncludedInOriginal			3
1071	6	1071#6	1071	Juvenile	Case		System must display prominently on the user's calendar when an event is disposed.	See parent	Future hearings can be deleted. This will remove the appointment on the staff's calendar - current functionality	IncludedInOriginal			3
1071	7	1071#7	1071	Juvenile	Case		System must allow user to schedule hearing date and time for an event.	See parent	current functionality	IncludedInOriginal			3
1071	8	1071#8	1071	Juvenile	Case		System must allow user to choose the primary home screen for that user.	See parent	DPOs and SDPOs are directed to their caseload screens, staff are directed to search screen, directors are directed to the SDPOs underneath them. Any other views will need additional customization and are not included.	IncludedInOriginal			3
1071	9	1071#9	1071	Juvenile	Case		System must allow user to default the primary home screen for a user based on their role and/or sub-role.	See parent	current functionality	IncludedInOriginal			3
1071	10	1071#10	1071	Juvenile	Case		System must allow user to navigate to Citation details from the Traffic Court Calendar.	See parent	will add case number to the existing court hearing summary screen and make it a hyperlink which will take the user to the Traffic Summary screen.	IncludedInOriginal			3
1071	11	1071#11	1071	Juvenile	Case		System must display information about the citation for which the event is scheduled when the user chooses to view Citation details.	See parent	Traffic Citation Summary and detail screens have the specifics of the citation in addition to the court hearings, court orders and conditions screens - current functionality	IncludedInOriginal			3
1071	12	1071#12	1071	Juvenile	Case		System must update event calendar in real time.	See parent	all system updates are real time - current functionality	IncludedInOriginal			3
1071	13	1071#13	1071	Juvenile	Case		System must update event calendar in real time when walk-in events are scheduled for the same day.	See parent	user can schedule a court hearing for the same day and enter the corresponding court order - current functionality	IncludedInOriginal			3



1071	14	1071#14	1071	Juvenile	Case		System must allow user to view event calendar with the most current information.	See parent	current functionality	IncludedInOriginal			3
1071	15	1071#15	1071	Juvenile	Case		System must allow user to view Client History for the client during the event.	See parent	current functionality	IncludedInOriginal			3
1071	16	1071#16	1071	Juvenile	Case		System must allow user to view the previous citations if any for the client for the hearing event.	See parent	case history, current functionality	IncludedInOriginal			3
1071	17	1071#17	1071	Juvenile	Case		System must allow user to quickly navigate to the client's profile and history when the client is at the hearing event.	See parent	client info, - current functionality	IncludedInOriginal			3
1071	18	1071#18	1071	Juvenile	Case		System must allow user to quickly switch back from the client history screen back to hearing event screen and vice-versa.	See parent	use the footprints to navigate to previous screens - current functionality	IncludedInOriginal			3
1071	19	1071#19	1071	Juvenile	Case		System must display prominently on the event calendar if the event was scheduled or if it was a walk-in event.	See parent	will add a walk-in flag to the court hearings screen so user can distinguish between a scheduled and walk-in events.	IncludedInOriginal			3
1071	20	1071#20	1071	Juvenile	Case		System must allow user to add new violation for the same citation for a client at the time of the hearing event.	See parent	will modify court order screen to add new charges/violations at the time of the hearing.	IncludedInOriginal			3
1071	21	1071#21	1071	Juvenile	Case		System must automatically calculate and display Total Amount imposed as fine in Conditions Information screen.	See parent	the fine amounts are displayed on the court order screen and not the conditions screen	IncludedInOriginal			3
1071	22	1071#22	1071	Juvenile	Case		System must allow user to print the Traffic Order including the fine amount for each violation, conditions for the citation.	See parent	system allows for tracking this information and printing can be done via regular browser print option.	IncludedInOriginal			3
1071	23	1071#23	1071	Juvenile	Case		System must display dismissed violation if present in Traffic Order with notes and/or comments for the dismissal reason.	See parent	court order screen - current functionality	IncludedInOriginal			3
1071	24	1071#24	1071	Juvenile	Case		System must display reduced violation if present in Traffic Order with notes and/or comments for the reason for reducing the violation.	See parent	need to modify court order screen to allow for entering reduced violation	IncludedInOriginal			3
1071	N/A	1071	1071	Juvenile	Case	Court Hearing/Court Report Summary	See Supplement: Hearing Officer	72	See itemized	IncludedInOriginal			3
1077	1	1077#1	1077	Adult	Case	Case Filing	System must allow the user to record a client's application for requesting Expungement after the client is completed probation.	See parent	allow to add new case sub type after termination or closure of the case	IncludedInOriginal			3
1077	2	1077#2	1077	Adult	Case	Case Filing	System must allow the user to record the status of a client's application for Expungement after the client has requested and submitted an application for expungement.	See parent	add additional field for status on Filing info screen	IncludedInOriginal			3
1077	3	1077#3	1077	Adult	Case	Case Filing	System must allow the user to record detailed information from the client's application for expungement.	See parent	possibly add additional fields related to expungement case sub type on the filing screen. User can also enter the details as case notes.	IncludedInOriginal			3
1077	4	1077#4	1077	Adult	Case	Case Filing	System must allow user to record and update detailed information on criminal history for the client when the client submits an application for expungement.	See parent	write the expungement case sub type details to criminal history screens	IncludedInOriginal			7
1077	5	1077#5	1077	Adult	Case	Case Filing	System must allow the user to record and update detailed information for a DMV record for a client when the client submits an application for expungement.		need more specifics	PendingEstimate			6
1077	6	1077#6	1077	Adult	Case	Case Filing	System must allow the user to review detailed information for a client on expungement eligibility when the client requests for expungement.		need more specifics	PendingEstimate			3
1077	7	1077#7	1077	Adult	Case	Case Filing	System must allow the user to record detailed information on expungement eligibility when the client requests for expungement.	See parent	need more specifics as where the info is to be recorded, which screens and what info? could be a form template	IncludedInOriginal			6
1077	8	1077#8	1077	Adult	Case	Case Filing	System must allow the user to print complete expungement details, and investigation and recommendation details for a client who has requested expungement.	See parent	case notes, form template	IncludedInOriginal			6
1077	9	1077#9	1077	Adult	Case	Case Filing	System must allow the user to reopen a terminated case when a client requests expungement.	See parent	expungement will be entered as a case subtype and app will be modified to allow for adding this subtype after case termination.	IncludedInOriginal			3
1077	10	1077#10	1077	Adult	Case	Case Filing	System must allow the user to create a new filing after reopening a terminated case when a client requests expungement.	See parent	same as response to #9 above	IncludedInOriginal			3

1077	11	1077#11	1077	Adult	Case	Case Filing	System must allow the user to add a new court hearing after reopening a terminated case when a client requests expungement.	See parent	modify the app to allow for adding court hearings on case that is to be expunged	IncludedInOriginal			3
1077	12	1077#12	1077	Adult	Case	Case Filing	System must allow the user to add a new court order after reopening a terminated case when a client requests expungement.	See parent	use court order screen with modifications to allow for adding orders after case is terminated	IncludedInOriginal			3
1077	13	1077#13	1077	Adult	Case	Case Filing	System must allow the user to record detailed information on the disposition after reopening a terminated case when a client requests expungement.	See parent	see response to #12 above	IncludedInOriginal			3
1077	14	1077#14	1077	Adult	Case	Case Filing	System must allow the user to terminate the case after reopening of previously terminated case when a client has requested expungement.	See parent	see response to #9 above.	IncludedInOriginal			3
1077	N/A	1077	1077	Adult	Case	Case Filing	See Supplement: Expungement	120	see itemized	IncludedInOriginal			3
1078	1	1078#1	1078	Juvenile	Case	Court Hearing Information	System must allow user to record the status for Dual Caseload.	See parent	On Petition info screen, indicate the case sub type as dual caseload and/or enter the disposition on the court order screen for a dual caseload, if applicable.	IncludedInOriginal			3
1078	2	1078#2	1078	Juvenile	Case	Court Hearing Information	System must allow user to record the Lead Agency for a case.	See parent	customize either the petition screen or court dispo screen to allow for entering the Lead Agency for dual caseload case type	IncludedInOriginal			3
1078	3	1078#3	1078	Juvenile	Case	Court Hearing Information	System must prominently display the status of Dual Caseload.	See parent	will use the current client status in the header and case status on the case summary screen to display the dual caseload status. This will be derived based on the latest court dispo, similar to the current behavior.	IncludedInOriginal			3
1078	N/A	1078	1078	Juvenile	Case	Court Hearing Information	See Supplement: Dual Caseload	80	see itemized	IncludedInOriginal			3
1080	1	1080#1	1080	Adult	Case	Case Filing	System must allow the user to record client's petition for Prop 47 reduction.	See parent	See parent	IncludedInOriginal			3
1080	2	1080#2	1080	Adult	Case	Case Filing	System must allow the user to record detailed information on the petition for Prop 47 reduction.	See parent	See parent	IncludedInOriginal			3
1080	3	1080#3	1080	Adult	Case	Case Filing	System must allow the user to record the status of the Prop 47 reduction by a client.	See parent	See parent	IncludedInOriginal			3
1080	4	1080#4	1080	Adult	Case	Case Filing	System must allow the user to retain all original convictions/charges for the case when the client is successfully granted Prop 47 reduction.	See parent	See parent	IncludedInOriginal			3
1080	5	1080#5	1080	Adult	Case	Case Filing	System must allow the user to required detailed information for Prop 47 reductions when the client is successfully granted Prop 47 reduction.	See parent	See parent	IncludedInOriginal			3
1080	6	1080#6	1080	Adult	Case	Case Filing	System must allow the user to record the status of the case when the client has requested Prop 47 reduction.	See parent	See parent	IncludedInOriginal			3
1080	7	1080#7	1080	Adult	Case	Case Filing	System must track detailed information including but not limited to Prop 47 reductions, case information, case status for statistical data.	See parent	See parent	IncludedInOriginal			3
1080	8	1080#8	1080	Adult	Case	Case Filing	System must allow user to change a conviction/charge from felony to misdemeanor for a client when the client is successfully granted Prop 47 reduction.	See parent	See parent	IncludedInOriginal			3
1080	9	1080#9	1080	Adult	Case	Case Filing	System must allow the user to select a future court date for the court hearing for the Prop 47 reduction petition.	See parent	See parent	IncludedInOriginal			3
1080	10	1080#10	1080	Adult	Case	Case Filing	System must allow the user to record the decision at the court hearing for a Prop 47 petition.	See parent	See parent	IncludedInOriginal			3
1080	11	1080#11	1080	Adult	Case	Case Filing	System must allow the user to record detailed information for each charge that was granted Prop 47 reduction in the case for a client.	See parent	See parent	IncludedInOriginal			3
1080	12	1080#12	1080	Adult	Case	Case Filing	System must display original charges, conviction levels and new Prop 47 reductions in the case for a client when the client is successfully granted Prop 47 reduction.	See parent	See parent	IncludedInOriginal			3
1080	13	1080#13	1080	Adult	Case	Case Filing	System must not delete original charges and conviction levels in a case when the client is successfully granted Prop 47 reduction.	See parent	See parent	IncludedInOriginal			3

1080	14	1080#14	1080	Adult	Case	Case Filing	System must allow the user to continue and record all phases of supervision when a client is successfully granted Prop 47 reduction and the client is still in active supervision.	See parent	See parent	IncludedInOriginal			3
1080	N/A	1080	1080	Adult	Case	Case Filing	See Supplement: Prop 47	120	Customization - Possibly enter Prop 47 as a case sub type if the client is still active on Probation. Modify the court order screens to allow for tracking the reduced charges and enter necessary details in the comments. If the case is closed, allow for re-opening the case and add Prop 47 as a sub type or enter a new case and new filing on the original arrest. Modify the court order screens accordingly. Need further discussion with SMC to get the detailed requirements.	PendingConfirmation			3
1085	1	1085#1	1085	Adult	Case		System must allow user to record an in-custody client referral.	see parent	See parent	IncludedInOriginal			2
1085	2	1085#2	1085	Adult	Case		System must allow user to record booking charges while performing intake for in-custody client.	see parent	See parent	IncludedInOriginal			3
1085	3	1085#3	1085	Adult	Case		System must allow user to record arraignment date for the in-custody client.	see parent	See parent	IncludedInOriginal			3
1085	4	1085#4	1085	Adult	Case		System must allow user to record the status of the in-custody client through the life of the case.	see parent	See parent	IncludedInOriginal			3
1085	5	1085#5	1085	Adult	Case		System must allow user to record the court order of the arraignment for in-custody client.	see parent	See parent	IncludedInOriginal			3
1085	6	1085#6	1085	Adult	Case		System must allow user to change the status of the in-custody client after arraignment.	see parent	See parent	IncludedInOriginal			3
1085	7	1085#7	1085	Adult	Case		System must automatically update the status of the client when the client is released on Supervised Own Recognition (SOR).	see parent	See parent	IncludedInOriginal			3
1085	8	1085#8	1085	Adult	Case		System must allow user to record the release of a client on SOR.	see parent	See parent	IncludedInOriginal			3
1085	9	1085#9	1085	Adult	Case		System must allow user to record detailed information for supervision for client on SOR.	see parent	See parent	IncludedInOriginal			3
1085	10	1085#10	1085	Adult	Case		System must allow user to record supervision conditions for a client on SOR.	see parent	See parent	IncludedInOriginal			3
1085	11	1085#11	1085	Adult	Case		System must allow user to record details of office visits for a client on SOR.	see parent	See parent	IncludedInOriginal			7
1085	12	1085#12	1085	Adult	Case		System must allow user to record detailed information on telephone check-ins for a client on SOR.	see parent	See parent	IncludedInOriginal			7
1085	13	1085#13	1085	Adult	Case		System must allow user to record detailed information on randomly performed drug tests for a client on SOR.	see parent	See parent	IncludedInOriginal			7
1085	14	1085#14	1085	Adult	Case		System must maintain status of client as under SOR for the life of the case, when the client is on SOR.	see parent	See parent	IncludedInOriginal			7
1085	15	1085#15	1085	Adult	Case		System must automatically terminate the SOR status for a client when the case is closed either as a dismissal or conviction.	see parent	See parent	IncludedInOriginal			3
1085	16	1085#16	1085	Adult	Case		System must automatically terminate the SOR workflow for an SOR client when the case is closed either as a dismissal or conviction.	see parent	See parent	IncludedInOriginal			3
1085	17	1085#17	1085	Adult	Case		System must allow user to record criminal history for a client on SOR.	see parent	See parent	IncludedInOriginal			7
1085	18	1085#18	1085	Adult	Case		System must allow user to record detailed client information including but not limited to demographics and contact information for a client on SOR.	see parent	See parent	IncludedInOriginal			1
1085	19	1085#19	1085	Adult	Case		System must allow user to record criminal history for a new client on SOR.	see parent	See parent	IncludedInOriginal			7
1085	20	1085#20	1085	Adult	Case		System must automatically pre-populate criminal history for a client on SOR if the information already exists in the System.	see parent	See parent	IncludedInOriginal			7
1085	21	1085#21	1085	Adult	Case		System must allow user to record pending cases, and related information for a client on SOR.	see parent	See parent	IncludedInOriginal			3
1085	22	1085#22	1085	Adult	Case		System must allow user to record recommendation for a client for or against SOR.	see parent	See parent	IncludedInOriginal			6

1085	23	1085#23	1085	Adult	Case		System must allow user to record new charges for the client before arraignment hearing.	see parent	See parent	IncludedInOriginal			3
1085	24	1085#24	1085	Adult	Case		System must allow user to modify/update existing charges for a client before arraignment hearing.	see parent	See parent	IncludedInOriginal			3
1085	25	1085#25	1085	Adult	Case		System must allow user to record SOR conditions for a client when the client is released on Supervised Own Recognizance.	see parent	See parent	IncludedInOriginal			3
1085	26	1085#26	1085	Adult	Case		System must allow user to record detailed information on phone check ins for the client on SOR.	see parent	See parent	IncludedInOriginal			7
1085	27	1085#27	1085	Adult	Case		System must allow user to set up recurring appointments for a client on SOR to check in.	see parent	See parent	IncludedInOriginal			7
1085	28	1085#28	1085	Adult	Case		System must allow user to record detailed information on drug tests for a client on SOR.	see parent	See parent	IncludedInOriginal			7
1085	29	1085#29	1085	Adult	Case		System must allow user to record detailed information on office visits by the client on SOR.	see parent	See parent	IncludedInOriginal			7
1085	30	1085#30	1085	Adult	Case		System must notify user when a client on SOR has failed to keep an appointment.	see parent	See parent	IncludedInOriginal			7
1085	31	1085#31	1085	Adult	Case		System must allow user to record detailed information on any/all SOR violations when a client is released on SOR.	see parent	See parent	IncludedInOriginal			7
1085	32	1085#32	1085	Adult	Case		System must allow user to record the revocation of SOR for a client who was previously released on SOR.	see parent	See parent	IncludedInOriginal			3
1085	33	1085#33	1085	Adult	Case		System must allow user to record detailed information when an SOR is revoked for a client who was previously released on SOR.	see parent	See parent	IncludedInOriginal			3
1085	34	1085#34	1085	Adult	Case		System must allow user to record detailed information on bench warrant and warrant amount when an SOR is revoked for a client was previously released on SOR.	see parent	See parent	IncludedInOriginal			3
1085	35	1085#35	1085	Adult	Case		System must automatically update the status of SOR to complete when the associated case is disposed.	see parent	See parent	IncludedInOriginal			3
1085	36	1085#36	1085	Adult	Case		System must allow user to record detailed information on the disposition of the case for the client who was released on SOR.	see parent	See parent	IncludedInOriginal			3
1085	N/A	1085	1085	Adult	Case		See Supplement: Pre-Trial Services	160	Customization - Pre-trial cases can be tracked through regular case module. The arrest information can be entered vial intake screens, case can be started with the filing screens. Different phases of pre-trial can be tracked through case subtypes (investigation, Supervised OR, termination, etc). Pre-trial conditions can be entered on the Conditions of Probation screen. Will need to modify the appointments screen to allow for recurring appointments. New workflow need to be set up for failed appointments. New workflow need to set up for SOR violations. Customize the case filings to allow for SOR revocations.	IncludedInOriginal			3
1090	1	1090#1	1090	Adult	Case		System must notify user when a client could already exist in the System.			EstimatedAsNetNew		0	2
1090	2	1090#2	1090	Adult	Case		System must allow user to select from the potential list of matching clients to consolidate with the current client.			EstimatedAsNetNew		0	2
1090	3	1090#3	1090	Adult	Case		System must allow user to view and compare both client profiles and all fields at the same time.			EstimatedAsNetNew		0	2

1090	4	1090#4	1090	Adult	Case		System must allow user to select one value as primary value from both client profiles.		EstimatedAsNetNew	0	3
1090	5	1090#5	1090	Adult	Case		System must allow user to select one value as primary value from both client profiles.		EstimatedAsNetNew	0	3
1090	6	1090#6	1090	Adult	Case		System must not delete permanently the overwritten value when consolidating client profiles.		EstimatedAsNetNew	0	3
1090	7	1090#7	1090	Adult	Case		System must record the overwritten values in the client history to allow user to view overwritten values.		EstimatedAsNetNew	0	3
1090	8	1090#8	1090	Adult	Case		System must allow user to undo one or all consolidate actions when consolidating client profiles.		EstimatedAsNetNew	0	3
1090	9	1090#9	1090	Adult	Case		System must allow user to completely un-consolidate client profiles and restore both the profiles and their related records in their original state before consolidation.		EstimatedAsNetNew	0	3
1090	N/A	1090	1090	Adult	Case		See Supplement: Client Consolidation		EstimatedAsNetNew	0	3
1092	1	1092#1	1092	Juvenile	Case	Court Order Information	System must allow the user to enter the Maximum Confinement Time set at each Court hearing.		EstimatedAsNetNew		3
1092	2	1092#2	1092	Juvenile	Case	Court Order Information	System must allow the user to update/edit the max. time if and when it changes.		EstimatedAsNetNew		3
1092	3	1092#3	1092	Juvenile	Case	Court Order Information	System must calculate days in custody for each entrance, and deduct those days from the max. time in real time.		EstimatedAsNetNew		5
1092	4	1092#4	1092	Juvenile	Case	Court Order Information	System must calculate remaining max. time for youth who are in custody.		EstimatedAsNetNew		5
1092	N/A	1092	1092	Juvenile	Case	Court Order Information	See Supplement: Maximum confinement time		EstimatedAsNetNew	Yes	24

Total Customization Hours

2607.2

PM Hours

390

BA/QA/Architect/DBA

521

Total Estimated Hours

3518

Original Hours

2324

Revised Estimates

140

# ATTACHMENT D - CUSTOMIZATIONS - WORK PACKAGE ENHANCEMENT DETAILS

## Work Package 4 - Case Assignment & Transfer

Gap.ID	HLR ID/Sub.ID	Gap.ID# Sub.ID	Refer Parent	Area	Module	Screen	High Level Requirement Description	Capita's Original Estimate (hours)	Capita's comments	Estimation Status	Capita Updated?	Revised Estimates (hours)	SMC Proposed W.Package
597	1		597#1	Juvenile	Intake	Intake Assignment Information	System must allow user to record multiple count without having to enter each count manually			EstimatedAs NetNew	Yes	20	2
597	2		597#2	Juvenile	Intake	petition	System must allow user to record multiple count in petition screen			EstimatedAs NetNew	Yes	20	3
1091	1	1091#1	1091	Detention	Intake		System must allow user to record Juvenile Crime Report (JCR) when a client (youth) in custody commits a new crime.		This can be entered into the Arrest Description field in the Arrest section of the Juvenile Intake - Current functionality	EstimatedAs NetNew	Yes		2
1091	2	1091#2	1091	Detention	Intake		System must allow user to record re-arrest of the client when the client is in custody.		Current functionality	EstimatedAs NetNew	Yes		2
1091	3	1091#3	1091	Detention	Intake		System must allow user to record release of the client after re-arrested.		Release screens in Detention can be used to track the release of detained juveniles - current functionality	EstimatedAs NetNew	Yes		2
1091	4	1091#4	1091	Detention	Intake		System must allow user to record re-booking of a client when the client is already in custody.		User can use the existing detention screens to re-book the juvenile. Juvenile should be released under the original booking and new entrance information should be entered for the new booking - current functionality	EstimatedAs NetNew	Yes		2
1091	5	1091#5	1091	Detention	Intake		System must consider the re-booked crime as a new and separate crime, and not merge with the current crime for which the client is already in custody for.		User should enter a separate intake/arrest information and book the client into detention with the new arrest. - current functionality	EstimatedAs NetNew	Yes		2
1091	6	1091#6	1091	Detention	Intake		System must track all the activities and proceedings of the re-booked crime separately from the original booked crime.		If they are entered as separate cases, they are already tracked separately. If the new crime is booked under the same case with different petition, existing case screens need to be modified to track at the petition level.	EstimatedAs NetNew	Yes		3
1091	7	1091#7	1091	Detention	Intake		System must allow user to record and maintain separate court events for original arrest crime and new crime committed while in custody.		If the new crime is attached a different case and or petition, the court events can be tracked separately	EstimatedAs NetNew	Yes		3
1091	N/A	1091	1091	Detention	Intake		See Supplement: In-custody youth - new case			EstimatedAs NetNew	Yes	80	3
222	0	222#0	N/A	Adult	Case Assignment and Transfer	Case Assignment to SDPO Information	System must allow user to edit assignment without the approval of supervisor role when incorrect assignments were made as a result of user error.	24	Currently, system allows for clerical to assign the case to SPO and SPO then assigns to a PO. We will update the application to allow for clerical (or LOS) to transfer the case to a different SPO (using the SPO to SPO transfer screen and enter the reason as incorrect assignment) without having to go through the assignment process (SPO to PO assignment)	IncludedInOriginal			4

233	1	233#1	233	Juvenile	CaseAssignmentAndTransfer	DPO Summary	System must display email address and contact phone numbers for the Probation Officer.	40	these are maintained and displayed on the User Information screen. They are also visible on the PO Information screen. No change needed.	IncludedInOriginal			6
233	2	233#2	233	Juvenile	CaseAssignmentAndTransfer	DPO Summary	System must display Probation Officer's Schedule.	see parent	Not sure what this means. There are separate screens to display the POs caseload and workqueue. There is also the Employee Appointment screen that shows the POs appointment schedule. No change recommended.	IncludedInOriginal			7
233	3	233#3	233	Juvenile	CaseAssignmentAndTransfer	DPO Summary	System must display Work Associates for a Probation Officer.	see parent	The existing "Delegation of Authority" feature under PO Information screen can be extended to delegate a temporary PO for a certain time duration. Currently, this feature is only available for SPOs. We will extend this, so POs can delegate the responsibility to other POs and when the delegated PO logs in, they can see the workload of the other POs caseload as well.	IncludedInOriginal			7
242	0	242#0	N/A	Detention	CaseAssignmentAndTransfer	DPO Information	System must allow user to record the cell phone number for the DPO.	16	Will DPO cell phone contact to the user information as well as the PO information screens. Will need further discussion with SMC whether the phone information will be coming from AD or stored with PIMS.	IncludedInOriginal			7

Revised  
Estimates 120

Original Hours 80

Total Customization Hours 214  
PM Hours 32  
BA/QA/Architect/DBA 43  
Total Estimated Hours 289

# ATTACHMENT D - CUSTOMIZATIONS - WORK PACKAGE ENHANCEMENT DETAILS

## Work Package 5 - Detention, Incidents, & Grievances

Gap ID	HLR ID/Sub ID	Gap ID/Sub ID	Refer Parent	Area	Module	Screen	High Level Requirement Description	Capita's Original Estimate (hours)	Capita's comments	Estimation Status	Capita Updated?	Revised Estimates (hours)	SMC Proposed W.Package
1	1	2#1	2	Detention	Detention		System should display all of the staffs name you make in that shift.			IncludedInOriginal			5
2	2	2#2	2	Detention	Detention		System should allow user to filter their (Shift Summary) search by shift, date, staff and...	see parent	will extend the sort feature to the shift summary screen	IncludedInOriginal			5
2	3	2#3	2	Detention	Detention		User should have the ability to generate a Shift Summary report	see parent	this will handled as part of reports customization	IncludedInOriginal			5
2	4	2#4	2	Detention	Detention		System should allow user to select shift type	see parent	Sorting can be done by Shift Type on the Shift Summary screen.	IncludedInOriginal			5
2	5	2#5	2	Detention	Detention		System should allow user to select shift date	see parent	Sorting can be done by Shift Date on the Shift Summary screen.	IncludedInOriginal			5
2	6	2#6	2	Detention	Detention		System should allow user to select multiple staff	see parent	Staff will be a multiselect dropdown, on the Shift Summary Information screen, the dropdowns for staff will be implemented as a multi-select list (#1 above) change the comments to be in a grid format, and probably the staff and unit can be within the	IncludedInOriginal			5
2	7	2#7	2	Detention	Detention		System should allow multiple staff to enter multiple comment entries	see parent	current functionality, system allows for entering multiple entries per shift	IncludedInOriginal			5
2	8	2#8	2	Detention	Detention		System should have the capability to identify the staff that entered the comment	see parent	current functionality; the create and update user ids are tracked for each transaction and displayed on the top right of each screen. This is for the entire transaction, not just the	IncludedInOriginal			5
2	9	2#9	2	Detention	Detention		At the end of each staff comment entry, system should make that comment a read only (non-editable).	see parent	Once shift information is entered, the comments section can only be updated by users with overwrite	IncludedInOriginal			5
2	10	2#10	2	Detention	Detention		System should record the time the comment was entered by staff.	see parent	current functionality; the create and update timestamps are tracked for each transaction and displayed on the top right of each screen. This is for the entire transaction, not just the	IncludedInOriginal			5
2	11	2#11	2	Detention	Detention		System should sort staff's comments in chronological order	see parent	current functionality; sort feature can be used as sort by date	IncludedInOriginal			5
2	N/A	2	2	Detention	Detention	Hall Shift Summary Information	See Supplement: Shift Summary	24	N/A	IncludedInOriginal			5
10	N/A	10	458	Detention	Detention	Entrance, Movement, and Release Summary	See Supplement: Intake Status	See Gap ID 458.	Set up a workflow process to notify camp staff of any camp orders. Need more specifics when creating the workflow, i.e., creating the specific	EstimatedAsNetNew	Yes		5
11	N/A	11	1025	Detention	Detention	Entrance, Movement, and Release Summary	See Supplement: Non-Secure Detention Facility for Girls	see Gap ID 1025	N/A	IncludedInOriginal			5
275	0	275#0	N/A	Detention	Detention	Education Summary	This requirement is included in camp documents. System must allow user to record GEP School as a Referral Service to track the attendance for the clients attending Change agreed by Adult, juvenile, and Detention.	duplicate		IncludedInOriginal			7
300	1	300#1	300	Detention	Detention	Identifier Information	System should allow user to capture and record the date a youth was fingerprinted.			EstimatedAsNetNew	Yes	4	5
300	2	300#2	300	Detention	Detention		System should allow user to run a report to be capture any in custody youth that need to be fingerprinted.			EstimatedAsNetNew	Yes	0	5
301	0	301#0	N/A	Detention	Detention	Identifier Information	See ID 300	see Gap ID 300	see Gap ID 300	IncludedInOriginal			Closed
331	0	331#0	N/A	Detention	Detention		See ID 275	see Gap ID 275	see Gap ID 275	IncludedInOriginal			7
458	1	458#1	458	Detention	Detention		System must allow user to update Intake Status for a Client.	see parent	Intake dropdown can be updated on the Entrance Information screen to reflect the updated status. -	IncludedInOriginal			5
458	2	458#2	458	Detention	Detention		System must notify users based on their role/sub-role when the client's status is changed to "Camp Commit".	see parent	new workflow as indicated in Item id #10 and #11 above. Same workflow will be used here as well. No additional customization will be needed. #10 and #11 refer to a different supplemental document, Shift Summary, not Intake	IncludedInOriginal			5
458	N/A	458	458	Detention	Detention	Court Hearing Information	See Supplement: Intake Status	24	See itemized	IncludedInOriginal			5
459	N/A	459	436	Detention	Detention	Daily Tally Information	See Supplement: In-House Discipline Detention Facility	See parent	See parent	IncludedInOriginal			6
460	1	460#1	460	Detention	Detention		System must allow user to create merit point profile for the client during the intake of the client at Non-secure Detention Facility.	see parent	See parent	IncludedInOriginal			5
460	2	460#2	460	Detention	Detention		System must allow user to record points for the client immediately after the intake of the client at the Non-secure Detention Facility.	see parent	See parent	IncludedInOriginal			5
460	3	460#3	460	Detention	Detention		System must allow user to track the length of client's stay at Non-secure Detention Facility.	see parent	See parent	IncludedInOriginal			5
460	4	460#4	460	Detention	Detention		System must allow user to track the client's points per week for their stay in Non-secure Detention Facility.	see parent	See parent	IncludedInOriginal			5



460	5	460#5	460	Detention	Detention		System must allow user to track the total points accumulated by the client during their stay at Non-secure Detention Facility.	see parent	See parent	IncludedInOriginal			5
460	6	460#6	460	Detention	Detention		System must allow user to track the weekly point average for the client during their stay at Non-secure Detention Facility. Weekly Point Average is calculated as total accumulated points divided by the number of weeks of	see parent	See parent	IncludedInOriginal			5
460	7	460#7	460	Detention	Detention		System must not allow a client to be released from Non-secure Detention Facility prior to a pre-determined duration of time.	see parent	See parent	IncludedInOriginal			5
460	8	460#8	460	Detention	Detention		System must notify user when the client is eligible for release from Non-secure Detention Facility when the client has satisfied the conditions according to the release schedule.	see parent	See parent	IncludedInOriginal			5
460	9	460#9	460	Detention	Detention		System must allow user to record points for the client for each day.	see parent	See parent	IncludedInOriginal			5
460	10	460#10	460	Detention	Detention		System must allow user to record points for the client for the entire week at a single time.	see parent	See parent	IncludedInOriginal			5
460	11	460#11	460	Detention	Detention		System must allow user to record points for the client for each shift in a day.	see parent	See parent	IncludedInOriginal			5
460	12	460#12	460	Detention	Detention		System must allow user to edit previously recorded points until the points are tallied at the end of the week.	see parent	See parent	IncludedInOriginal			5
460	13	460#13	460	Detention	Detention		System must not allow user to edit points from the previous week.	see parent	See parent	IncludedInOriginal			5
460	14	460#14	460	Detention	Detention		System must allow user to record notes/comments for each shift when entering the points for	see parent	See parent	IncludedInOriginal			5
460	15	460#15	460	Detention	Detention		System must allow user to edit previously recorded notes/comments until the end of the week.	see parent	See parent	IncludedInOriginal			5
460	16	460#16	460	Detention	Detention		System must allow user to summate the points at the end of each week.	see parent	See parent	IncludedInOriginal			5
460	17	460#17	460	Detention	Detention		System must allow user to track and record points for each client on a weekly basis for the following areas - Section Behavioral Points, Kitchen Patrol Points (KP), Section Expectation Points, and	see parent	See parent	IncludedInOriginal			5
460	18	460#18	460	Detention	Detention		System must allow user to record an Incident Report for a client.	see parent	See parent	IncludedInOriginal			5
460	19	460#19	460	Detention	Detention		System must allow user to deduct points from a client when recording incident report.	see parent	See parent	IncludedInOriginal			5
460	20	460#20	460	Detention	Detention		System must account for the points deducted at the Incident Report into the Weekly Point calculation for the	see parent	See parent	IncludedInOriginal			5
460	21	460#21	460	Detention	Detention		System must allow user to record Sectional Behavioral points for each client for every shift.	see parent	See parent	IncludedInOriginal			5
460	22	460#22	460	Detention	Detention		System must allow user to record notes/comments for each shift when entering the Sectional Behavioral points due	see parent	See parent	IncludedInOriginal			5
460	23	460#23	460	Detention	Detention		System must allow user to display point summary for a client when the client requests to without disclosing information about an incident.	see parent	See parent	IncludedInOriginal			5
460	24	460#24	460	Detention	Detention		System must allow user to generate and print a report for a client detailing their accumulated points.	see parent	See parent	IncludedInOriginal			5
460	25	460#25	460	Detention	Detention		System must allow user to summate the Sectional Behavioral Points for a client for each week.	see parent	See parent	IncludedInOriginal			5
460	26	460#26	460	Detention	Detention		System must summate the Sectional Behavioral Points to the Weekly Points for a client.	see parent	See parent	IncludedInOriginal			5
460	27	460#27	460	Detention	Detention		System must summate the Sectional Behavioral Points to the Accumulated Points for a client.	see parent	See parent	IncludedInOriginal			5
460	28	460#28	460	Detention	Detention		System must summate the Sectional Behavioral Points to the Point Average for a client.	see parent	See parent	IncludedInOriginal			5
460	29	460#29	460	Detention	Detention		System must allow user to record Kitchen Patrol Points for a client when the client is assigned to Kitchen Based.	see parent	See parent	IncludedInOriginal			5
460	30	460#30	460	Detention	Detention		System must allow user to record Kitchen Patrol Points for a client for each day.	see parent	See parent	IncludedInOriginal			5
460	31	460#31	460	Detention	Detention		System must allow user to edit Kitchen Patrol Points for a client for the week until the end of the week.	see parent	See parent	IncludedInOriginal			5
460	32	460#32	460	Detention	Detention		System must summate the Kitchen Patrol Points to Weekly Points for a client.	see parent	See parent	IncludedInOriginal			5
460	33	460#33	460	Detention	Detention		System must summate the Kitchen Patrol Points to Total Accumulated Points for a client.	see parent	See parent	IncludedInOriginal			5
460	34	460#34	460	Detention	Detention		System must summate the Kitchen Patrol Points to Point Average for a client.	see parent	See parent	IncludedInOriginal			5
460	35	460#35	460	Detention	Detention		System must allow user to record Bonus Points for each client for each day.	see parent	See parent	IncludedInOriginal			5
460	36	460#36	460	Detention	Detention		System must allow user to edit Bonus Points for a client for the week until the end of the week.	see parent	See parent	IncludedInOriginal			5
460	37	460#37	460	Detention	Detention		System must summate the Bonus Points to the Weekly Points for a client.	see parent	See parent	IncludedInOriginal			5
460	38	460#38	460	Detention	Detention		System must summate the Bonus Points to the Total Accumulated Points for a client.	see parent	See parent	IncludedInOriginal			5
460	39	460#39	460	Detention	Detention		System must summate the Bonus Points to the Point Average for a client.	see parent	See parent	IncludedInOriginal			5

460	40	460#40	460	Detention	Detention		System must allow user to record goals for a client for each week.	see parent	See parent	IncludedInOriginal				5
460	41	460#41	460	Detention	Detention		System must allow user to track the goals for a client.	see parent	See parent	IncludedInOriginal				5
460	42	460#42	460	Detention	Detention		System must allow user to record Bonus Points against all the weekly goals together for the client.	see parent	See parent	IncludedInOriginal				5
460	43	460#43	460	Detention	Detention		System must allow user to record "write-ups" for a client.	see parent	See parent	IncludedInOriginal				5
460	44	460#44	460	Detention	Detention		System must allow user to track the "write-ups" against a client for the week.	see parent	See parent	IncludedInOriginal				5
460	45	460#45	460	Detention	Detention		System must allow user to record School Points for each client for each day.	see parent	See parent	IncludedInOriginal				5
460	46	460#46	460	Detention	Detention		System must allow user to edit School Points for each client for the week until the end of the week.	see parent	See parent	IncludedInOriginal				5
460	47	460#47	460	Detention	Detention		System must summate the School Points to the Weekly Points for a client.	see parent	See parent	IncludedInOriginal				5
460	48	460#48	460	Detention	Detention		System must summate the School Points to the Total Accumulated Points for a client.	see parent	See parent	IncludedInOriginal				5
460	49	460#49	460	Detention	Detention		System must summate the School Points to the Point Average for a client.	see parent	See parent	IncludedInOriginal				5
460	50	460#50	460	Detention	Detention		System must allow user to record and track School Points for each client in the following areas - Class Participation, Home Work, etc.	see parent	See parent	IncludedInOriginal				5
460	51	460#51	460	Detention	Detention		System must allow user to record Incident Report for a client.	see parent	See parent	IncludedInOriginal				5
460	52	460#52	460	Detention	Detention		System must allow user to track all Incident Reports against a client.	see parent	See parent	IncludedInOriginal				5
460	53	460#53	460	Detention	Detention		System must allow user to deduct points for a client for each Incident Report.	see parent	See parent	IncludedInOriginal				5
460	54	460#54	460	Detention	Detention		System must allow user to deduct points for a client from the Weekly Point Total for each Incident Report.	see parent	See parent	IncludedInOriginal				5
460	55	460#55	460	Detention	Detention		System must summate the negative points from the Incident Report to the Weekly Point Total for the client.	see parent	See parent	IncludedInOriginal				5
460	56	460#56	460	Detention	Detention		System must not allow the Weekly Point Total to go beyond negative 20 (-20) points for a week.	see parent	See parent	IncludedInOriginal				5
460	57	460#57	460	Detention	Detention		System must summate the negative points from the Incident Report to the Total Accumulated Points for the client.	see parent	See parent	IncludedInOriginal				5
460	58	460#58	460	Detention	Detention		System must summate the negative points from the Incident Report to the Point Average for the client.	see parent	See parent	IncludedInOriginal				5
460	59	460#59	460	Detention	Detention		System must allow user to review the Program Summary for each client.	see parent	See parent	IncludedInOriginal				5
460	60	460#60	460	Detention	Detention		System must allow user to record if the client is eligible for home pass for the week.	see parent	See parent	IncludedInOriginal				5
460	61	460#61	460	Detention	Detention		System must allow user to generate a detailed report for the weekly performance for a client.	see parent	See parent	IncludedInOriginal				5
460	62	460#62	460	Detention	Detention		System must allow user to generate a detailed report on the Program Summary for the client.	see parent	See parent	IncludedInOriginal				5
460	63	460#63	460	Detention	Detention		System must allow user to record the details of Home Pass when a client has received a home pass.	see parent	See parent	IncludedInOriginal				5
460	64	460#64	460	Detention	Detention		System must allow user to record details about the weekend curfew for a client.	see parent	See parent	IncludedInOriginal				5
460	65	460#65	460	Detention	Detention		System must allow user to record the duration of the home pass for a client.	see parent	See parent	IncludedInOriginal				5
460	66	460#66	460	Detention	Detention		System must allow user to track the number of times a client has received a home pass and the duration of each home pass.	see parent	See parent	IncludedInOriginal				5
460	67	460#67	460	Detention	Detention		System must calculate the eligibility for a client to receive home pass based on the pre-determined number of Total Accumulated Points.	see parent	See parent	IncludedInOriginal				5
460	68	460#68	460	Detention	Detention		System must calculate the eligibility for a client to receive home pass based on the pre-determined number of minimum duration of stay of the client at the Non-secure Detention.	see parent	See parent	IncludedInOriginal				5
460	69	460#69	460	Detention	Detention		System must calculate the eligibility for a client to receive home pass based on the pre-determined number of minimum Weekly Points for each week.	see parent	See parent	IncludedInOriginal				5
460	70	460#70	460	Detention	Detention		System must calculate the duration of the home pass the client is eligible for.	see parent	See parent	IncludedInOriginal				5
460	71	460#71	460	Detention	Detention		System must allow user to record the when a client is on "Special Detention".	see parent	See parent	IncludedInOriginal				5
460	72	460#72	460	Detention	Detention		System must allow user to record the reason for the Special Detention for a client.	see parent	See parent	IncludedInOriginal				5
460	73	460#73	460	Detention	Detention		System must allow user to record the duration of the Special Detention for a client.	see parent	See parent	IncludedInOriginal				5
460	74	460#74	460	Detention	Detention		System must allow user to reduce points for a client from the Total Accumulated Points only not impacting the Weekly Total.	see parent	See parent	IncludedInOriginal				5
460	75	460#75	460	Detention	Detention		System must allow user to record the points for a client on Special Detention separate from the regular point calculation.	see parent	See parent	IncludedInOriginal				5
460	76	460#76	460	Detention	Detention		System must allow user to record the minimum number of points the client to accumulate for each week to successfully complete that week of Special Detention.	see parent	See parent	IncludedInOriginal				5

460	77	460#77	460	Detention	Detention		System must allow user to not summate the points accumulated by the client while on Special Detention to the Weekly Point Total.	see parent	See parent	IncludedInOriginal			5
460	78	460#78	460	Detention	Detention		System must allow user to not summate the points accumulated by the client while on Special Detention to the Total Accumulated.	see parent	See parent	IncludedInOriginal			5
460	79	460#79	460	Detention	Detention		System must allow user to summate the overage points after the client has accumulated a minimum pre-determined number of points to the Weekly Point Total.	see parent	See parent	IncludedInOriginal			5
460	80	460#80	460	Detention	Detention		System must allow user to summate the overage points after the client has accumulated a minimum pre-determined number of points to the Total Accumulated Points.	see parent	See parent	IncludedInOriginal			5
460	81	460#81	460	Detention	Detention		System must keep a record of the points for each week that were not summated when the client is on Special Detention.	see parent	See parent	IncludedInOriginal			5
460	82	460#82	460	Detention	Detention		System must allow user to track the points that are not summated with respect to the week they were accumulated when the client has successfully completed Social Detention.	see parent	See parent	IncludedInOriginal			5
460	83	460#83	460	Detention	Detention		System must calculate the number of weeks a client is eligible for Earn Back phase as the number of weeks of stay at Social Detention.	see parent	See parent	IncludedInOriginal			5
460	84	460#84	460	Detention	Detention		System must allow user to record the number of weeks the client is eligible for "Earn-Back" phase.	see parent	See parent	IncludedInOriginal			5
460	85	460#85	460	Detention	Detention		System must track the points that can be earned back for each week of the Earn-Back phase.	see parent	See parent	IncludedInOriginal			5
460	86	460#86	460	Detention	Detention		System must summate the Earn-Back points earned during the Earn-Back phase to the Accumulated Points.	see parent	See parent	IncludedInOriginal			5
460	87	460#87	460	Detention	Detention		System must not summate the Earn-Back points earned to the Weekly Point Total.	see parent	See parent	IncludedInOriginal			5
460	88	460#88	460	Detention	Detention		System must summate the regular point earned during the Earn-Back phase to the Weekly Points, Accumulated Point Total and Weekly Point Total.	see parent	See parent	IncludedInOriginal			5
460	89	460#89	460	Detention	Detention		System must notify user that a client is not eligible for home pass for the first week after successful completion of Social Detention.	see parent	See parent	IncludedInOriginal			5
460	90	460#90	460	Detention	Detention		System must allow user to add points to the Accumulated Point Total without impacting the Weekly Point number.	see parent	See parent	IncludedInOriginal			5
460	91	460#91	460	Detention	Detention		System must allow user to record the Earn-Back points for the client in relation to the week number of their Special Detention.	see parent	See parent	IncludedInOriginal			5
460	92	460#92	460	Detention	Detention		System must allow user to record the minimum number of points a client has to accumulate to be eligible to earn back the Earn-Back.	see parent	See parent	IncludedInOriginal			5
460	93	460#93	460	Detention	Detention		System must calculate if a client is eligible to earn back the Earn-Back points for each week depending on the regular points accumulated for the respective week.	see parent	See parent	IncludedInOriginal			5
460	94	460#94	460	Detention	Detention		System must not allow user to record the Earn-Back point for a week after the respective week number has passed in the Earn-Back.	see parent	See parent	IncludedInOriginal			5
460	95	460#95	460	Detention	Detention		System must update the status of the client when the client is transferred to Juvenile Detention Hall.	see parent	See parent	IncludedInOriginal			5
460	96	460#96	460	Detention	Detention		System must update the status of the client when the client is released from Detention Hall.	see parent	See parent	IncludedInOriginal			5
460	97	460#97	460	Detention	Detention		System must allow user to record the transfer of the client to Juvenile Detention Hall.	see parent	See parent	IncludedInOriginal			5
460	98	460#98	460	Detention	Detention		System must notify user when a pre-determined duration of time has passed since the transfer of client to Juvenile Detention Hall.	see parent	See parent	IncludedInOriginal			5
460	99	460#99	460	Detention	Detention		System must allow user to record the reason for the transfer of the client to Juvenile Detention Hall.	see parent	See parent	IncludedInOriginal			5
460	100	460#100	460	Detention	Detention		System must allow user to record the duration of the client's stay at Juvenile Detention Hall.	see parent	See parent	IncludedInOriginal			5
460	101	460#101	460	Detention	Detention		System must allow user to not record Behavioral Point for the client for the duration of the stay at Juvenile Detention Hall when the client is transferred to Juvenile Detention Hall as a part of incident.	see parent	See parent	IncludedInOriginal			5
460	102	460#102	460	Detention	Detention		System must calculate the Weekly Point Average for the client after the client's return from Juvenile Detention Hall considering the zero points during the stay at Juvenile Detention Hall.	see parent	See parent	IncludedInOriginal			5
460	103	460#103	460	Detention	Detention		System must reduce a pre-determined number of points from the Accumulated Point Total immediately when the client is transferred to Juvenile Detention Hall as a part of incident.	see parent	See parent	IncludedInOriginal			5
460	104	460#104	460	Detention	Detention		System must allow user to record Dead-Time for a client.	see parent	See parent	IncludedInOriginal			5
460	105	460#105	460	Detention	Detention		System must allow user to record the duration of Dead Time for a client.	see parent	See parent	IncludedInOriginal			5

460	106	460#106	460	Detention	Detention		System must notify user when a client is not eligible for home pass when the client is on <del>Dead Time</del> .	see parent	See parent	IncludedInOriginal			5
460	107	460#107	460	Detention	Detention		System must reduce a pre-determined number of points from the Accumulated Point Total every week when the client is on <del>Dead Time</del> .	see parent	See parent	IncludedInOriginal			5
460	108	460#108	460	Detention	Detention		System must update that status of the client when the client is transferred to <del>Temporary Medical Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	109	460#109	460	Detention	Detention		System must update the status of the client when the client is transferred to <del>Temporary Medical Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	110	460#110	460	Detention	Detention		System must allow user to record transfer of a client to Temporary <del>Medical Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	111	460#111	460	Detention	Detention		System must allow user to record the reason for the client's transfer to Temporary Medical <del>Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	112	460#112	460	Detention	Detention		System must allow user to record the duration of the client's stay at the Temporary Medical <del>Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	113	460#113	460	Detention	Detention		System must allow user to record Sectional Behavioral Points for a client when the client is at Temporary Medical <del>Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	114	460#114	460	Detention	Detention		System must allow user to record Weekly Points for the client when the client is at Temporary Medical <del>Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	115	460#115	460	Detention	Detention		System must summate the points accumulated while at Temporary Medical Housing to the Accumulated Point <del>Total</del> .	see parent	See parent	IncludedInOriginal			5
460	116	460#116	460	Detention	Detention		System must summate the points accumulated while at Temporary Medical Housing to <del>Weekly Point Average</del> .	see parent	See parent	IncludedInOriginal			5
460	117	460#117	460	Detention	Detention		System must allow user to track the reason for the client's transfer to Temporary Medical <del>Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	118	460#118	460	Detention	Detention		System must allow user to record transfer of a client to Temporary <del>Courtesy Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	119	460#119	460	Detention	Detention		System must allow user to record the reason for the client's transfer to Temporary Courtesy <del>Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	120	460#120	460	Detention	Detention		System must allow user to record the duration of the client's stay at the Temporary Courtesy <del>Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	121	460#121	460	Detention	Detention		System must allow user to record Sectional Behavioral Points for a client when the client is at Temporary Courtesy <del>Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	122	460#122	460	Detention	Detention		System must allow user to record Weekly Points for the client when the client is at Temporary <del>Courtesy Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	123	460#123	460	Detention	Detention		System must summate the points accumulated while at Temporary Courtesy Housing to the Accumulated Point <del>Total</del> .	see parent	See parent	IncludedInOriginal			5
460	124	460#124	460	Detention	Detention		System must summate the points accumulated while at Temporary Courtesy Housing to <del>Weekly Point Average</del> .	see parent	See parent	IncludedInOriginal			5
460	125	460#125	460	Detention	Detention		System must allow user to track the reason for the client's transfer to Temporary Courtesy <del>Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	126	460#126	460	Detention	Detention		System must allow user to record points for a client who is on a home <del>pass</del> .	see parent	See parent	IncludedInOriginal			5
460	127	460#127	460	Detention	Detention		System must allow user to temporarily "pause the week counter" for a client at Non-secure Detention Facility when the client is serving therapeutic time at <del>Juvenile Detention Hall</del> .	see parent	See parent	IncludedInOriginal			5
460	128	460#128	460	Detention	Detention		System must allow user to temporarily "freeze the points" for a client at Non-secure Detention Facility when the client is serving therapeutic time at <del>Juvenile Detention Hall</del> .	see parent	See parent	IncludedInOriginal			5
460	129	460#129	460	Detention	Detention		System must retain the information for home pass for a client at Non-secure Detention Facility when the client is serving therapeutic time at <del>Juvenile Detention Hall</del> .	see parent	See parent	IncludedInOriginal			5
460	130	460#130	460	Detention	Detention		System must retain all information for a client in Non-secure Detention Facility when the client is temporarily serving therapeutic time at <del>Juvenile Detention Hall</del> .	see parent	See parent	IncludedInOriginal			5
460	131	460#131	460	Detention	Detention		System must allow user to continue the stay at Non-secure Detention Facility for a client when the client is reinstated back to Non-secure Detention <del>Housing</del> .	see parent	See parent	IncludedInOriginal			5
460	132	460#132	460	Detention	Detention		System must continue the point calculation and weekly counter from the point it was paused before the client was transferred to Juvenile Detention Hall for serving therapeutic <del>time</del> .	see parent	See parent	IncludedInOriginal			5
460	133	460#133	460	Detention	Detention		System must continue the calculation for home pass from the point it was paused before the client was transferred to Juvenile Detention Hall for serving <del>therapeutic time</del> .	see parent	See parent	IncludedInOriginal			5
460	134	460#134	460	Detention	Detention		System must allow user to record communication with client at predetermined intervals of time when the client is on home pass from Non-Secure <del>Detention Facility</del> .	see parent	See parent	IncludedInOriginal			5

460	135	460#135	460	Detention	Detention		System must allow user to record detailed information about drug tests for the client when at Non-Secure Detention Facility.	see parent	See parent	IncludedInOriginal			5
460	136	460#136	460	Detention	Detention		System must allow user to track all the drug tests performed on a client when the client is at Non-Secure Detention Facility.	see parent	See parent	IncludedInOriginal			5
460	137	460#137	460	Detention	Detention		System must allow user to record the preliminary results of the drug test for a client at Non-Secure Detention Facility.	see parent	See parent	IncludedInOriginal			5
460	138	460#138	460	Detention	Detention		System must allow user to record detailed information when the sample for drug test is sent for lab for detailed analysis when the client is at Non-Secure Detention Facility.	see parent	See parent	IncludedInOriginal			5
460	139	460#139	460	Detention	Detention		System must allow user to record results for drug test from lab for the client at Non-Secure Detention Facility.	see parent	See parent	IncludedInOriginal			5
460	140	460#140	460	Detention	Detention		System must allow user to track the results of all drug tests performed on a client at Non-Secure Detention Facility.	see parent	See parent	IncludedInOriginal			5
460	141	460#141	460	Detention	Detention		System must allow user to record the details of the curfew call made to the client at Non-Secure Detention Facility when the client is on home	see parent	See parent	IncludedInOriginal			5
460	N/A	460	460	Detention	Detention	Daily Tally	See Supplement: Merit Points at Non-secure Detention Facility	200	Refer to Merit_Points_at_Non-Secure_Detention_Facility for specifics of this requirement. Due to the large size of the document, this information is not embedded here. Customizations - The existing merit points screens will be customized to track points for boys in the non-secured detention facility. Might need some modifications to track the points by shift. Some of the tasks will need some modifications. Edits need to be in place for prior week points. Need some customization to track the Sectional Behavioral Points, Kitchen Patrol, write-ups, School Points, etc. Home Passes will be	IncludedInOriginal			5
461	N/A	461	460	Detention	Detention	Daily Tally	See Supplement: Merit Points at Non-secure Detention Facility	see Gap ID 460	see Gap ID 460	IncludedInOriginal			5
463	N/A	463	N/A	Juvenile	Detention	Detention facility population summary	System must allow user to record entrance status for a client			EstimatedAsNew		16	5
465	1	465#1	465	Detention	Detention		System must display alert when enhanced supervision is in effect.	see parent	customize the app in automatically create an enhanced supervision alert when first entered and anytime the level is upgraded or downgraded. Need specifics from SMC if for every upgrade or downgrade, the original alert should be updated or expired	IncludedInOriginal			5
465	2	465#2	465	Detention	Detention		System must display separate alerts for each active enhanced supervision.	see parent	will add the feature	IncludedInOriginal			5
465	3	465#3	465	Detention	Detention		System must display enhanced supervision alert and regular alert separately.	see parent	not sure which regular alert you are referring to? Enhanced Supervision will have its own alert and display along with the	IncludedInOriginal			5
465	4	465#4	465	Detention	Detention		System must notify users when a new enhanced supervision record is created.	see parent	create a workflow task to send an email alert to the PO or staff (TBD by SMC on who to notify) when the enhanced supervision level is created or changed.	IncludedInOriginal			5
465	N/A	465	465	Detention	Detention	Enhanced Supervision Information	See Supplement: Enhanced Supervision Information.	0	See response to item #466 below	IncludedInOriginal			5
466	N/A	466	465	Detention	Detention	Enhanced Supervision Summary	See Supplement: Enhanced Supervision Information.	16	See 465#1, 465#2, 465#3	IncludedInOriginal			5
476	1	476#1	476	Detention	IncidentsAndGrievances		User should have the ability to generate an incident/information report.	see Gap ID 544	which user? Staff involved? Need specific reqs.	IncludedInOriginal			5
476	2	476#2	476	Detention	IncidentsAndGrievances		System should generate a unique incident report number.	see Gap ID 544	current functionality	IncludedInOriginal			5
476	3	476#3	476	Detention	IncidentsAndGrievances		Multiple users (GS) should have the ability to write informational/incident reports about the same incident report	see Gap ID 544	will modify the existing Incident Information screen to allow for generating a word template and a PDF for the incident report and associate with each staff	IncludedInOriginal	Yes		5
476	4	476#4	476	Detention	IncidentsAndGrievances		System should have the ability to alert involved users when incident report needs to be submitted and reviewed.	see Gap ID 544	additional workflow will be added.	IncludedInOriginal	Yes		5
476	5	476#5	476	Detention	IncidentsAndGrievances		System must record the level of involvement (in an incident) for each staff.	see Gap ID 544	workflow that will be added for #4 above will include the tasks for #4 and #5.	IncludedInOriginal	Yes		5
476	6	476#6	476	Detention	IncidentsAndGrievances		User (ISM) needs the ability to review and approve incident reports.	see Gap ID 544	modify the staff present grid to add the level of involvement.	IncludedInOriginal	Yes		5
476	7	476#7	476	Detention	IncidentsAndGrievances		System should generate a read-only (non-editable) document upon supervisor approval.	see Gap ID 544	which user? staff involved or the supervisor? Need specifics	IncludedInOriginal	Yes		5
476	8	476#8	476	Detention	IncidentsAndGrievances		System should link specific incident reports to specific clients	see Gap ID 544	which user? staff involved or the supervisor? Need specifics.	IncludedInOriginal	Yes		5
476	9	476#9	476	Detention	IncidentsAndGrievances		System must alert assigned PO and Juvenile Hall Director that an incident report was generated	see Gap ID 544	once the incident is finalized in word, user can click the submit button to finalize the word document and	IncludedInOriginal	Yes		5
476	10	476#10	476	Detention	IncidentsAndGrievances		System must be required to record if medical staff was notified of the incident	see Gap ID 544	document to add need more specifics.	IncludedInOriginal	Yes		5

476	11	476#11	476	Detention	IncidentsAndGrievance s		System must be required to record the "Use-of-force" in the incident	see Gap.ID 546	the incident tracks the clients and staff involved with the incident. Is the requirement that when staff is filling the incident report, to pre-populate the client information? Need more information?	IncludedInOriginal	Yes			5
476	12	476#12	476	Detention	IncidentsAndGrievance s		System must record who the On Duty ISM was at the time of the incident	see Gap.ID 544	part of the workflow tasks as indicated in #4 and #5 above.	IncludedInOriginal	Yes			5
476	13	476#13	476	Detention	IncidentsAndGrievance s		System must record the status of incident report (pending, open, or closed)	see Gap.ID 544	add additional fields on Incident Information screen or can it be in the narrative on the Incident module?	IncludedInOriginal	Yes			5
476	14	476#14	476	Detention	IncidentsAndGrievance s		User needs the ability to define the clients level of involvement in a specific incident	see Gap.ID 545	currently tracked at the incident level. Should it be tracked for each client separately?	IncludedInOriginal	Yes			5
476	15	476#15	476	Detention	IncidentsAndGrievance s		User must have the ability to enter various disciplinary actions per client	see Gap.ID 545	current functionality, this information can be entered in the "Duty Supervisor" field.	IncludedInOriginal	Yes			5
476	16	476#16	476	Detention	IncidentsAndGrievance s		System needs to record the disciplinary action	see Gap.ID 545	current functionality	IncludedInOriginal	Yes			5
476	17	476#17	476	Detention	IncidentsAndGrievance s		System must have the ability to capture if a client was advised of their right to due process/hearing	see Gap.ID 545	current functionality	IncludedInOriginal	Yes			5
476	18	476#18	476	Detention	IncidentsAndGrievance s		System must have the ability to capture the decision made by client (waive their rights to a hearing)	see Gap.ID 545	will add Disposition column to the Client Involved grid on Incident Information	IncludedInOriginal	Yes			5
476	19	476#19	476	Detention	IncidentsAndGrievance s		System must capture if the OD/ISM was notified of hearing requirement	see Gap.ID 545	will add the new column to the Client Involved grid on Incident Information	IncludedInOriginal	Yes			5
476	20	476#20	476	Detention	IncidentsAndGrievance s		System must allow user to record if the client decided to waive their rights to a hearing	see Gap.ID 545	will add the new column to the Client Involved grid on Incident Information	IncludedInOriginal	Yes			5
476	21	476#21	476	Detention	IncidentsAndGrievance s		System must allow user to record if OD/ISM was notified of hearing requirement	see Gap.ID 545	will add the new column to the Client Involved grid on Incident Information"	IncludedInOriginal	Yes			5
476	22	476#22	476	Detention	IncidentsAndGrievance s		System must allow user to record rules at incident level for a client			PendingEstimate				5
476	23	476#23	476	Detention	IncidentsAndGrievance s		System must allow external users to limited access to view and/or record incident reports			EstimatedAsNetNew		0		5
476	N/A	476	476	Detention	IncidentsAndGrievance s	Incident Information	See Supplement: Incident Reports	see Gap.ID 544	No reference to line item 476 in the supplemental document. See item 544 for specifics on Incidents	IncludedInOriginal	Yes			5
477	0	477	N/A	Juvenile	IncidentsAndGrievance s	Incident Information	system must allow user to upload a word document into incident module.			PendingEstimate				6
481	0	481#0	N/A	Detention	Detention	Mental Health Assessment Summary	System must allow user to record additional comments/notes for each entry for Mental Health Assessment Summary document	16	Will add Comments field to each Mental Health Assessment record on Mental Health Assessment Summary	IncludedInOriginal				5
482	0	482	483	Juvenile	Detention	Mental Health Assessment Summary	Included in mental health assessment summary document	see parent		IncludedInOriginal				5
483	1	483#1	483	Detention	Detention		System must allow users based on their role and/or sub-role to view mental health assessment performed on a client	see parent	existing functionality - controlled by user security	IncludedInOriginal				5
483	2	483#2	483	Detention	Detention		System must allow users based on their role and/or sub-role to record mental health assessment performed on a client	see parent	existing functionality - controlled by user security	IncludedInOriginal				5
483	3	483#3	483	Detention	Detention		System must allow user to record the type of Mental Health Assessment performed on a client. Types include: a. Mental Health Youth Request b. Court Ordered Mental Health Assessment c. Camp Clearance	see parent	Existing Mental Health Assessment screen will be updated to include the above assessment types.	IncludedInOriginal				5
483	4	483#4	483	Detention	Detention		System must allow user to record notes and comments for each assessment performed.	see parent	Existing Mental Health Assessment screen will be updated to include the above assessment types.	IncludedInOriginal				5
483	5	483#5	483	Detention	Detention		System must allow users based on their role and/or sub-role to view assessment notes and comments.	see parent	The existing security on the screen will be extended to include field level security for the comments section	IncludedInOriginal				5
483	6	483#6	483	Detention	Detention		System must not allow users based on their role and/or sub-role to delete mental health assessment records and/or information for	see parent	existing functionality - controlled by user security	IncludedInOriginal				5
483	7	483#7	483	Juvenile	Detention		System must not allow Behavior Health & Recovery Services (BHRS) Mental Health Staff to delete any record and/or information for any Mental Health Assessment for any client.	see parent	existing functionality - controlled by user security	IncludedInOriginal				5
483	N/A	483	483	Detention	Detention	Mental Health Assessment Summary	See Supplement: Mental Health Assessment Summary	24	See itemized	IncludedInOriginal				5
485	N/A	485	460	Detention	Detention	Merit Point Summary	See Supplement: Merit Points at Non-secure Detention Facility	see Gap.ID 460	see Gap.ID 460	IncludedInOriginal				5
489	N/A	489	436	Detention	Detention	Merit Ladder Summary	See Supplement: In-House Discipline Detention Facility		No reference to this task id in the supplemental document.	PendingEstimate				5
494	0	494#0	N/A	Detention	Detention	Physical Exam Summary	System must alert user when a physical exam is due for a client.	16	Add a new workflow that includes an alert or task to alert the responsible staff to complete the physical exam.	IncludedInOriginal				5

497	1	497#1	497	Detention	Detention		System must allow user to search for client by Client Name	See parent	Will change the label to Client name. Will add a finder next to Client name and clicking on it will bring up the standard search window where user can search for client name.	IncludedInOriginal				5
497	2	497#2	497	Detention	Detention		System must allow user to select and record the property assigned to client.	See parent	existing Property screen will be modified to track the property assigned to client (in addition to what was received from the client).	IncludedInOriginal				5
497	3	497#3	497	Detention	Detention		System must not allow user to select the same bag more than once, if it is already assigned.	See parent	will update each of the sections to include a bag number for the property received. Bag number will be a dropdown and filter out the bag number.	IncludedInOriginal				5
497	4	497#4	497	Detention	Detention		System must allow user to record amount of money.	See parent	this is already tracked under Cash section on the Property screen.	IncludedInOriginal				5
497	5	497#5	497	Detention	Detention		System must allow user to assign receipt number.	See parent	is this for the cash or the property? If for the entire property, it is already tracked. Should it be system generated? If you need a separate receipt number for cash, will modify the cash section to generate	IncludedInOriginal				5
497	6	497#6	497	Detention	Detention		System must allow ISM to verify cash.	See parent	Will add additional fields under Cash section to track the ISM that verified the cash.	IncludedInOriginal				5
497	7	497#7	497	Detention	Detention		System must allow user to capture and record multiple items of clothing with prepopulated options for different types of clothes.	See parent	Will modify the Clothing Description within the Clothing and Medication section to be as check boxes instead of free text.	IncludedInOriginal				5
497	8	497#8	497	Detention	Detention		System must allow user to record details about release of property to other people/agency besides the client.	See parent	Will modify the Property screen to allow for tracking the release information of the property received.	IncludedInOriginal				5
497	N/A	497	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	32	See itemized	IncludedInOriginal				5
498	N/A	497	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	see parent		EstimatedAsNew		4		5
499	N/A	497	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	see parent		IncludedInOriginal				5
500	N/A	497	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	see parent		IncludedInOriginal				5
501	N/A	497	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	see parent		IncludedInOriginal				5
502	N/A	497	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	see parent		IncludedInOriginal				5
503	N/A	503	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	32	See 497#2 to 497#6	IncludedInOriginal				5
504	N/A	504	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	8	See responses to item #503	IncludedInOriginal				5
505	N/A	505	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	0	Receipt number for cash will be added. See responses to item #497 above	IncludedInOriginal				5
508	0	508#0	N/A	Detention	Detention	Release Clearance	System must alert user when a client is released and their related property is not yet released.	16	Currently, as part of the release clearance process, property need to be released to the client before the client is released. Should the existing process be modified to allow for releasing the client even if the property is not released? New workflow will be created for the	IncludedInOriginal				5
516	1	516#1	516	Detention	Detention		System must allow user to record meals served, and meals refused for each institution and unit.	see parent	modify the existing resident head count information to in	IncludedInOriginal				5
516	2	516#2	516	Detention	Detention		System must allow user to generate report for Total Meals Served per month.	see parent	this can be done using a standard or ad hoc report	IncludedInOriginal				5
516	3	516#3	516	Detention	Detention		System must allow user to print the Total Meals Served Monthly Report.	see parent	the report can be printed after it is generated	IncludedInOriginal				5
516	4	516#4	516	Detention	Detention		System must allow user to record breakfast, lunch and dinner as separate meals.	see parent	if they are entered as such on the resident head count screen, the information can be generated as such	IncludedInOriginal				5
516	5	516#5	516	Detention	Detention		System must allow user to record unusual activities of a client for each shift separately.	see parent	N/A	IncludedInOriginal				5
516	6	516#6	516	Detention	Detention		System must allow user to record comments for each unusual activity.	see parent	Customization - update the existing Resident Head Count Information screen to record the unusual activity and enter pertinent comments. It will be grid within the main	IncludedInOriginal				5
516	7	516#7	516	Detention	Detention		System must allow user to generate report for Unusual Activities per month.	see parent	this will be handled as part of the reports development.	IncludedInOriginal				5
516	N/A	516	516	Detention	Detention	Hall Resident Head Count Information	See Supplement: Hall Resident Head Count Information	0	See responses to item #718	IncludedInOriginal				5
519	0	N/A	516	Detention	Detention	Hall Resident Head Count Information	See Supplement: Hall Resident Head Count Information	see parent		IncludedInOriginal				5

520	0	520#0	N/A	Detention	Detention	Schedule/Received Movement Information	System must allow user to select clients from pre-populated list to schedule movement within different facilities.	16	Add a finder next to the client number, so user can search for detained juveniles that are to be scheduled for movement.	IncludedInOriginal				5
521	0	521#0	N/A	Detention	Detention	Schedule/Received Movement Information	Validation is not required if the user is able to select the client by searching and/or by using a prepopulated list. See ID 520.	duplicate		IncludedInOriginal				5
527	0	527	2	Detention	Detention		See Supplement: shift summary	See parent		IncludedInOriginal				5
528	0	528	2	Detention	Detention		See Supplement: shift summary	See parent		IncludedInOriginal				5
535	N/A	535	465	Detention	Detention	Enhanced Supervision Information	See Supplement: Enhanced Supervision Information	12	see 465#4	IncludedInOriginal				5
537	N/A	537	497	Detention	Detention	Property Search	See Supplement: Property Receipt Information	8	See 497#1	IncludedInOriginal				5
542	0	542#0	N/A	Detention	IncidentsAndGrievances	Edit Grievances	System must allow the user to record the values for Grievances as Open, Pending, or Closed.	16	Customization will include: 1. Add a mandatory grievance status dropdown at the grievance level. 2. Add a workflow process to notify the director when a grievance is closed.	IncludedInOriginal				5
544	N/A	544	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	96	which user? Staff involved? Need specific tasks.	IncludedInOriginal				5
545	N/A	545	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	24	See 476#17 to 476#21	IncludedInOriginal				5
546	N/A	546	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	0	Addressed in Req id #544 above.	IncludedInOriginal				5
547	N/A	547	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	0	Addressed in Req id #544 above.	IncludedInOriginal				5
548	N/A	548	476	Detention	IncidentsAndGrievances	Incident Information	see ID 476#22		Req 548 is not included in the supplemental document. There is no information in the document regarding roles. Estimate cannot be provided at this time.	PendingEstimate				5
549	N/A	549	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	0	Addressed in Req id #545 above.	IncludedInOriginal				5
550	N/A	550	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	0	Addressed in Req id #544 above.	IncludedInOriginal				5
551	N/A	551	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	0	Addressed in Req id #545 above.	IncludedInOriginal				5
557	0	557#0	N/A	Detention	IncidentsAndGrievances	Grievance Procedure Information	System must allow user to select multiple options for Nature of Grievance	16	Modify Nature of Grievance to have a multi select check box and update the corresponding database tables to support the multiple nature of	IncludedInOriginal				5
560	N/A	560	476	Detention	IncidentsAndGrievances	Incident Reports	See Supplement: Incident Reports	0	Addressed in Req id #545 above.	IncludedInOriginal				5
563	N/A	563	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	0	Addressed in Req id #544 above.	IncludedInOriginal				5
573	N/A	573	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	0	Addressed in Req id #545 above.	IncludedInOriginal				5
574	N/A	574	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	0	Addressed in Req id #544 above.	IncludedInOriginal				5
575	N/A	575	476	Detention	IncidentsAndGrievances	Incidents	See Supplement: Incident Reports	see parent		PendingEstimate				5
576	N/A	576	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	0	Addressed in Req id #544 above.	IncludedInOriginal				5
672	1	672#1	672	Detention	Detention	Detention, client record, screening	System must notify user when a client is committed to a program at Non-secure Detention Facility.	see parent	Capita is assuming the non-detention facility is referring to a Camp. When a client is ordered camp, there could be a workflow process that will trigger notification to the Camp.	IncludedInOriginal				5
672	2	672#2	672	Detention	Detention	Detention, client record, screening	System must allow user to record and track if Medical Consent form was signed or not for newly committed client at Non-secure Detention Facility.	see parent	this information could be added to the screening screen. The screening check list will be different for halls and camps.	IncludedInOriginal				5
672	3	672#3	672	Detention	Detention	Detention, client record, screening	System must allow user to record and track if Medical Clearance was completed or not for newly committed clients at Non-secure Detention Facility.	see parent	this information could be added to the screening screen. The screening check list will be different for halls and camps.	IncludedInOriginal				5
672	4	672#4	672	Detention	Detention	Detention, client record, screening	System must allow user to record and track if Mental Health Evaluation was completed or not for newly committed clients at Non-secure Detention Facility.	see parent	the existing screen will be modified to track the evaluation separately for both halls and camps	IncludedInOriginal				5
672	5	672#5	672	Detention	Detention	Detention, client record, screening	System must notify user before the client is transported to Non-secure Detention Facility when the Medical Consent form is not complete or not signed.	see parent	Movement screens will be modified to check for the Medical Consent form completion on the screening screen. If incomplete, the message will be displayed at the time of	IncludedInOriginal				5
672	6	672#6	672	Detention	Detention	Detention, client record, screening	System must notify user before the client is transported to Non-secure Detention Facility when the Medical Clearance is not complete.	see parent	Movement screens will be modified to check for the Medical Clearance on the screening screen. If incomplete, the message will be displayed at the time of scheduling the	IncludedInOriginal				5
672	7	672#7	672	Detention	Detention	Detention, client record, screening	System must notify user before the client is transported to Non-secure Detention Facility when the Mental Health evaluation is not	see parent	Movement screens will be modified to check for the Mental Health Evaluation. If incomplete, the message will be displayed at the time of	IncludedInOriginal				5
672	8	672#8	672	Detention	Detention	Detention, client record, screening	System must allow user to view Court Report from Probation Officer and Court Memorandum before client is transferred to Non-secure Detention Facility Detention.	see parent	this is controlled by user security. If user has access to the images/form templates, they will be able to see all the uploaded documents, including the court reports for the	IncludedInOriginal				5
672	N/A	672	672	Detention	Detention		See Supplement: New client commitment at Non-secure Detention Facility.	96		IncludedInOriginal				5
691	N/A	691	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	0	See response to item #497 above	IncludedInOriginal				5
692	N/A	692	497	Detention	Detention	Property Receipt Information	See Supplement: Property Receipt Information	0	See response to item #497 above	IncludedInOriginal				5
718	N/A	718	516	Detention	Detention	Hall Resident Head Count Information	See Supplement: Hall Resident Head Count Information	40	See 516#1 to 516#4	IncludedInOriginal				5
719	N/A	719	516	Detention	Detention	Hall Resident Head Count Information	See Supplement: Hall Resident Head Count Information	0	See responses to item 718	IncludedInOriginal				5
1016	1	1016#1	1016	Detention	Detention		System must allow user to record Therapeutic Time court order.	see parent	N/A	IncludedInOriginal				5
1016	2	1016#2	1016	Detention	Detention		System must generate the actual release date when user inputs the TIME, DATE and CTS.	see parent	N/A	IncludedInOriginal				5
1016	3	1016#3	1016	Detention	Detention		System must calculate the start time for Therapeutic Detention from the following (current date + 1) day when the client is scheduled to court date.	see parent	N/A	IncludedInOriginal				5



1016	4	1016#4	1016	Detention	Detention		System must allow user to update the status of the client from Intake to Therapeutic Detention. System must allow user to record the following information - Therapeutic time (THD), Good Behavior time (GBT) and Credit Time Serve (CTS).	see parent	Existing functionality	IncludedInOriginal			5
1016	5	1016#5	1016	Detention	Detention		System must allow user to record the following information - Therapeutic time (THD), Good Behavior time (GBT) and Credit Time Serve (CTS).	see parent	N/A	IncludedInOriginal			5
1016	6	1016#6	1016	Detention	Detention		System must calculate the expected release date automatically when THD, GBT and CTS are entered.	see parent	N/A	IncludedInOriginal			5
1016	7	1016#7	1016	Detention	Detention		System must notify user of the expected release date by generating case note.	see parent	N/A	IncludedInOriginal			5
1016	8	1016#8	1016	Detention	Detention		System must calculate the start time for Therapeutic Detention from the date the client is booked when the client is not already in Therapeutic Detention.	see parent	N/A	IncludedInOriginal			5
1016	9	1016#9	1016	Detention	Detention		System must allow user to record intake type as Therapeutic Detention for the client when booking.	see parent	N/A	IncludedInOriginal			5
1016	10	1016#10	1016	Detention	Detention		System must allow user to record Therapeutic time (THD), Good Behavior time (GBT) and Credit Time Serve (CTS).	see parent	N/A	IncludedInOriginal			5
1016	11	1016#11	1016	Detention	Detention		System must calculate the expected release date automatically when THD, GBT and CTS are entered.	see parent	N/A	IncludedInOriginal			5
1016	12	1016#12	1016	Detention	Detention		System must notify user of the expected release date by generating case note.	see parent	N/A	IncludedInOriginal			5
1016	13	1016#13	1016	Detention	Detention		System must allow user to generate a report of all the clients serving Therapeutic Detention including their expected release date in the	see parent	this effort will be under reports development.	IncludedInOriginal			5
1016	14	1016#14	1016	Detention	Detention		System must allow user to reduce GBT (Good Behavior time) given by the court for disciplinary reasons.	see parent	N/A	IncludedInOriginal			5
1016	15	1016#15	1016	Detention	Detention		System must allow user to update the GBT (Good Behavior Time) given by the court for disciplinary reasons.	see parent	N/A	IncludedInOriginal			5
1016	16	1016#16	1016	Detention	Detention		System must recalculate expected release date when the user reduces GBT (Good Behavior time).	see parent	N/A	IncludedInOriginal			5
1016	17	1016#17	1016	Detention	Detention		System must auto generate a case note to the user when expected release date changes.	see parent	Customization - new set of screens (summary and detail) will be developed to calculate the expected release date based on THD, GBT, CTS. Case notes will be generated based on the different actions. The time will be automatically calculated based on the rules provided by county. User will have the ability to override the expected release date.	IncludedInOriginal			5
1016	N/A	1016	1016	Detention	Detention	Entrance, Movement, and Release Summary	See Supplement: Therapeutic Detention	80	See itemized	IncludedInOriginal			5
1020	0	1020#0	N/A	Detention	Detention		Included in various camp documents. We would like the system to track our Camp Clients from date of arrival at camp to date: (successful graduation, max time graduation, failure probation violation, avoid, new charges, program failure). Track dates on Camp Furlough (successful graduate furlough, furlough failure). Track dates on Camp Aftercare (successful or failure). All this should be accessible to all via	duplicate		IncludedInOriginal			Closed
1021	1	1021#1	1021	Detention	Detention		System must allow user to record the intake status of the client.	see parent	this can be done on the Entrance Information by entering the status - current functionality.	IncludedInOriginal			5
1021	2	1021#2	1021	Detention	Detention		System must allow user to update the intake status of the client.	see parent	status can be updated any time as long as the juvenile is detained - current functionality.	IncludedInOriginal			5
1021	3	1021#3	1021	Detention	Detention		System must notify users when intake status changes from "Home Pass" to "AWOL".	see parent	need to create an alert when the status changes to AWOL. Need to create a workflow process to send email alerts in this connection.	IncludedInOriginal			7
1021	4	1021#4	1021	Detention	Detention		System must allow user to generate AWOL Information Report containing client's contact information, interested parties, and criminal summary when the intake status	see parent	this will be handled under the reports	IncludedInOriginal			6
1021	5	1021#5	1021	Detention	Detention		System must notify users when intake status of client changes from Institutions (Camp Glenwood or Camp Kemp) to AWOL.	see parent	Need to create an alert when the status changes to AWOL. Need to create a workflow process to send email alerts to the respective	IncludedInOriginal			7
1021	6	1021#6	1021	Detention	Detention		System must allow user to generate AWOL Information Report containing client's contact information, interested parties, and criminal summary when the intake status	see parent	this will be handled under the reports	IncludedInOriginal			6
1021	N/A	1021	1021	Detention	Detention	Alert Summary	See Supplement: AWOL Alert	24	See itemized	IncludedInOriginal			5
1022	N/A	1022	476	Detention	IncidentsAndGrievances	Incident Information	See Supplement: Incident Reports	see Gap.ID 476#23	No corresponding documentation.	EstimatedAsNetNew		0	5
1025	1	1025#1	1025	Detention	Detention		System must allow user to perform intake for a client into NSDFG.	see parent	Client can be transferred from Hall to Camp using Movement screens. Upon acceptance at the location, client will be	IncludedInOriginal			5
1025	2	1025#2	1025	Detention	Detention		System must allow user to change the location for the client when the client is transferred to NSDFG.	see parent	automatically adjusted current functionality	IncludedInOriginal			5

1025	3	1025#3	1025	Detention	Detention		System must allow user to assign bed/dorm to a client when the client is transferred to NSDFG.	see parent	use existing unit assignment screens to assign bed/dorm	IncludedInOriginal				5
1025	4	1025#4	1025	Detention	Detention		System must allow user to record the release of the client to staff from NSDFG when the client will be transferred to NSDFG.	see parent	client will show as detained as NSDFG and will no longer show at the other facility they came from.	IncludedInOriginal				5
1025	5	1025#5	1025	Detention	Detention		System must allow user to record the duration for which the client is sentenced to NSDFG.	see parent	detention time is tracked on the court order screens.	IncludedInOriginal				3
1025	6	1025#6	1025	Detention	Detention		System must calculate the start time for detention from the time of sentencing when the client is sentenced to NSDFG.	see parent	all admission, movements and releases are tracked, which allows to track/report duration of stay.	IncludedInOriginal				5
1025	7	1025#7	1025	Detention	Detention		System must allow user to record detailed information about the orientation held when the client is sentenced to NSDFG.	see parent	use the screening information screens to track any orientation.	IncludedInOriginal				5
1025	8	1025#8	1025	Detention	Detention		System must allow user to record detailed information about counseling programs for the client and parents/legal guardians when the client is at NSDFG.	see parent	use the regular supervision/programs screens	IncludedInOriginal				7
1025	9	1025#9	1025	Detention	Detention		System must allow user to record detailed information about the home pass for the client in Phase 1 at NSDFG.	see parent	home passes can be entered as tasks on Merit Points screen. - configuration	IncludedInOriginal				5
1025	10	1025#10	1025	Detention	Detention		System must not allow the user to move the P1-client at NSDFG to Phase 2 when the client has not completed all the requirements.	see parent	Possibly use the levels screen, and it might need some customization based on the exact requirements	IncludedInOriginal				5
1025	11	1025#11	1025	Detention	Detention		System must calculate the eligibility of the client to transition to Phase 2 depending on the pre-requisites required when the client is at NSDFG.	see parent	Possibly use the levels screen, and it might need some customization based on the exact requirements	IncludedInOriginal				5
1025	12	1025#12	1025	Detention	Detention		System must notify the user when a P1-client at NSDFG is eligible for Phase 2.	see parent	set up a corresponding workflow when the change in level happens	IncludedInOriginal				5
1025	13	1025#13	1025	Detention	Detention		System must allow user to record pre-requisites and its status for the client to transition to Phase 2 when the client is at NSDFG.	see parent	either modify the existing the Level screens to track the information, or if it is more generic, add a configurable administrative section, or come up with a new screen. Need more	IncludedInOriginal				5
1025	14	1025#14	1025	Detention	Detention		System must allow user to record detailed information for P1-client at NSDFG for court review.	see parent	can be entered on the Level Information screen.	IncludedInOriginal				5
1025	15	1025#15	1025	Detention	Detention		System must allow the user to record detailed information for court report for a Phase 1 client at NSDFG.	see parent		IncludedInOriginal				5
1025	16	1025#16	1025	Detention	Detention		System must allow the user to transfer the P1-client at NSDFG to juvenile detention hall.	see parent	can transfer the youth from one location to other using the existing movement screens.	IncludedInOriginal				5
1025	17	1025#17	1025	Detention	Detention		System must allow user to record detailed information when P1-client at NSDFG is temporarily transferred to juvenile detention hall.	see parent	current movement screens capture that information and it is also reflected on the EMR screen.	IncludedInOriginal				5
1025	18	1025#18	1025	Detention	Detention		System must continue to track and record the stay for a P1-client at NSDFG when the client has returned from the temporary stay at juvenile detention hall.	see parent	can be tracked via the movement screens.	IncludedInOriginal				5
1025	19	1025#19	1025	Detention	Detention		System must allow the user to record detailed information on the progress of the P1-client at NSDFG to determine the client's eligibility to graduate to Phase 2.	see parent	use the existing Level screen	IncludedInOriginal				5
1025	20	1025#20	1025	Detention	Detention		System must allow users to record the transfer of the P1-client at NSDFG to Phase 2.	see parent	use the existing Level screen	IncludedInOriginal				5
1025	21	1025#21	1025	Detention	Detention		System must update the status of the P1-client at NSDFG when the client has moved to Phase 2.	see parent	The level summary screen tracks all the levels and changes to different levels.	IncludedInOriginal				5
1025	22	1025#22	1025	Detention	Detention		System must notify user when a P1 client is eligible to move to Phase 2.	see parent	will be part of a new workflow	IncludedInOriginal				5
1025	23	1025#23	1025	Detention	Detention		System must allow the user to record the start of Phase 2 for a client after graduating from Phase 1 and NSDFG.	see parent	Refer to the supplemental documents for the remaining requirements (from 41 to 167) Capita is providing a high level estimate based on the document. The transitioning between phases and how it can be handled within PIMS can be discussed further during the gap review sessions. Also, the levels are currently maintained within Detention, but looks like for subsequent phases, client is released from detention but the levels still need to be maintained.	IncludedInOriginal				5
1025	24	1025#24	1025	Detention	Detention		System must allow user to record detailed information for the P2-client when the client is on electronic monitoring.	see parent	N/A	IncludedInOriginal				5
1025	25	1025#25	1025	Detention	Detention		System must allow the user to record detailed information for a P2-client for the curfew calls.	see parent	N/A	IncludedInOriginal				5
1025	26	1025#26	1025	Detention	Detention		System must allow the user to record detailed information on school for P2-client.	see parent	N/A	IncludedInOriginal				5
1025	27	1025#27	1025	Detention	Detention		System must allow user to record the decisions made for P2-client for school placement.	see parent	N/A	IncludedInOriginal				5
1025	28	1025#28	1025	Detention	Detention		System must allow user to record detailed information when a P2-client visit NSDFG as a part of their weekly mandatory status.	see parent	N/A	IncludedInOriginal				5
1025	29	1025#29	1025	Detention	Detention		System must allow user to record detailed information for a P2-client when the client opts for transportation to and from NSDFG.	see parent	N/A	IncludedInOriginal				5
1025	30	1025#30	1025	Detention	Detention		System must allow the user to record detailed information for randomly performed drug tests for P2-clients.	see parent	N/A	IncludedInOriginal				7

1025	31	1025#31	1025	Detention	Detention		System must allow the user to record failure/noncompliance to curfew calls for P2 clients.	see parent	N/A	IncludedInOriginal			5
1025	32	1025#32	1025	Detention	Detention		System must allow the user to record failure/noncompliance to drug tests for P2 clients.	see parent	N/A	IncludedInOriginal			5
1025	33	1025#33	1025	Detention	Detention		System must allow user to transfer a P2 client back NSDFG for a predetermined number of days as a result of failure/violation to curfew calls and/or	see parent	N/A	IncludedInOriginal			5
1025	34	1025#34	1025	Detention	Detention		System must allow the user to record detailed information on the court order for a P2 client who fails curfew calls or drug tests.	see parent	N/A	IncludedInOriginal			3
1025	35	1025#35	1025	Detention	Detention		System must allow the user to transfer P2 client back to Phase 1 in NSDFG and/or Therapeutic Time when ordered by the court as a result of failure/violation to curfew calls and/or	see parent	N/A	IncludedInOriginal			5
1025	36	1025#36	1025	Detention	Detention		System must allow user to record detailed information on monthly court review for P2 clients.	see parent	N/A	IncludedInOriginal			5
1025	37	1025#37	1025	Detention	Detention		System must allow user to record the time to be served by a P2 client in Phase 2.	see parent	N/A	IncludedInOriginal			5
1025	38	1025#38	1025	Detention	Detention		System must allow the user to record the transfer of P2 client to Phase 3.	see parent	N/A	IncludedInOriginal			5
1025	39	1025#39	1025	Detention	Detention		System must update the status for a client when the client has moved from Phase 2 to Phase 3.	see parent	N/A	IncludedInOriginal			5
1025	40	1025#40	1025	Detention	Detention		System must notify user when a P2 client is eligible to move to Phase 3.	see parent	N/A	IncludedInOriginal			5
1025	41	1025#41	1025	Detention	Detention		System must allow user to record Phase 2 clients who attend NSDFG school as a part of their Phase 2.	see parent	N/A	IncludedInOriginal			5
1025	42	1025#42	1025	Detention	Detention		System must allow user to record the attendance of P2-GEP client at NSDFG school.	see parent	N/A	IncludedInOriginal			5
1025	43	1025#43	1025	Detention	Detention		System must enforce all requirements for P2 client on P2-GEP client.	see parent	N/A	IncludedInOriginal			5
1025	44	1025#44	1025	Detention	Detention		System must allow the user to assign officers to P3 clients.	see parent	N/A	IncludedInOriginal			4
1025	45	1025#45	1025	Detention	Detention		System must allow user to record detailed information on school for P3 clients.	see parent	N/A	IncludedInOriginal			5
1025	46	1025#46	1025	Detention	Detention		System must allow user to record detailed information for P3 client's visit to NSDFG schools.	see parent	N/A	IncludedInOriginal			5
1025	47	1025#47	1025	Detention	Detention		System must allow user to record detailed information for P3 client's court review monthly.	see parent	N/A	IncludedInOriginal			5
1025	48	1025#48	1025	Detention	Detention		System must allow the user to record detailed information for randomly performed drug tests for P3 client.	see parent	N/A	IncludedInOriginal			7
1025	49	1025#49	1025	Detention	Detention		System must allow user to record detailed information for curfew calls made to P3 client.	see parent	N/A	IncludedInOriginal			7
1025	50	1025#50	1025	Detention	Detention		System must allow the user to record detailed information for failure/violation for any/all conditions for P3 clients.	see parent	N/A	IncludedInOriginal			5
1025	51	1025#51	1025	Detention	Detention		System must allow user to record a transfer of P3 client back to Phase 2 as a result of failing conditions required by P3 client.	see parent	N/A	IncludedInOriginal			5
1025	52	1025#52	1025	Detention	Detention		System must allow user to record recommendations to the court by an officer for a P3 client when that is a violation and/or new offense.	see parent	N/A	IncludedInOriginal			5
1025	53	1025#53	1025	Detention	Detention		System must allow user to record the eligibility of a P3 client to graduate from the program.	see parent	N/A	IncludedInOriginal			5
1025	54	1025#54	1025	Detention	Detention		System must allow user to record detailed information to determine the eligibility of a P3 client to	see parent	N/A	IncludedInOriginal			5
1025	55	1025#55	1025	Detention	Detention		System must notify user when a P3 client is eligible to graduate from the program.	see parent	N/A	IncludedInOriginal			5
1025	56	1025#56	1025	Detention	Detention		System must change the status of a P3 client when the client has graduated from the program.	see parent	N/A	IncludedInOriginal			5
1025	57	1025#57	1025	Detention	Detention		System must allow user to vacate orders for a client when the client is graduated from Phase 3.	see parent	N/A	IncludedInOriginal			3
1025	58	1025#58	1025	Detention	Detention		System must allow user to continue to required information for a client when the client has graduated from Phase 3, and is still an adolescent.	see parent	N/A	IncludedInOriginal			7
1025	59	1025#59	1025	Detention	Detention		System must allow the user to terminate the probation for a client when the client has graduated from Phase 3.	see parent	N/A	IncludedInOriginal			3
1025	60	1025#60	1025	Detention	Detention		System must allow the user to record detailed information on court order for the client to graduate from Phase 3.	see parent	N/A	IncludedInOriginal			3
1025	61	1025#61	1025	Detention	Detention		System must allow the user to continue the probation for a client when the client is graduated from Phase 3.	see parent	N/A	IncludedInOriginal			7
1025	62	1025#62	1025	Detention	Detention		System must automatically calculate the release date for a client based on the number of days sentenced, time served at Juvenile Detention Hall and considering	see parent	N/A	IncludedInOriginal			5
1025	63	1025#63	1025	Detention	Detention		System must change the status for a client graduating from Phase 3 to the next stage as available to the client.	see parent	N/A	IncludedInOriginal			6
1025	64	1025#64	1025	Detention	Detention		System must allow the user to record the duration for which a client at NSDFG will be serving time at Camp Theroistic.	see parent	N/A	IncludedInOriginal			5

1025	65	1025#65	1025	Detention	Detention		System must change the status for a client at NSDFC when the client is serving time at Camp Therapeutic.	see parent	N/A	IncludedInOriginal				6
1025	66	1025#66	1025	Detention	Detention		System must not allow user to transfer a client serving time at Camp Therapeutic to attend court.	see parent	N/A	IncludedInOriginal				5
1025	67	1025#67	1025	Detention	Detention		System must allow user to record permissions for outings for a client serving time at Camp Therapeutic.	see parent	N/A	IncludedInOriginal				5
1025	68	1025#68	1025	Detention	Detention		System must allow the user to record detailed information about the status of a client who is on probation and attending NSDFC.	see parent	N/A	IncludedInOriginal				5
1025	69	1025#69	1025	Detention	Detention		System must allow user to record attendance of a client attending NSDFC school.	see parent	N/A	IncludedInOriginal				5
1025	70	1025#70	1025	Detention	Detention		System must allow user to record recommendations made for a client to attend NSDFC school.	see parent	N/A	IncludedInOriginal				5
1025	71	1025#71	1025	Detention	Detention		System must allow user to record court order for a client to move to GEP.	see parent	N/A	IncludedInOriginal				3
1025	72	1025#72	1025	Detention	Detention		System must change the status of a client when the client is moved to GEP.	see parent	N/A	IncludedInOriginal				6
1025	73	1025#73	1025	Detention	Detention		System must allow user to record detailed information on the orientation with the client and their parents/legal guardian to review the expectations when the client is moved to camp.	see parent	N/A	IncludedInOriginal				5
1025	74	1025#74	1025	Detention	Detention		System must allow the user to record detailed information when the client opts for NSDFC provided.	see parent	N/A	IncludedInOriginal				5
1025	75	1025#75	1025	Detention	Detention		System must allow user to record detailed information on family and individual therapy that are required to be attended by client.	see parent	N/A	IncludedInOriginal				5
1025	76	1025#76	1025	Detention	Detention		System must allow user to record the duration for which a client is assigned to GEP.	see parent	N/A	IncludedInOriginal				3
1025	77	1025#77	1025	Detention	Detention		System must allow user to record the officer assigned to a GEP client.	see parent	N/A	IncludedInOriginal				4
1025	78	1025#78	1025	Detention	Detention		System must allow user to record report for a GEP client on behavior every week.	see parent	N/A	IncludedInOriginal				5
1025	79	1025#79	1025	Detention	Detention		System must allow the user to record detailed information on randomly performed drug tests on a GEP client.	see parent	N/A	IncludedInOriginal				7
1025	80	1025#80	1025	Detention	Detention		System must allow user to record detailed information on curfew calls made to GEP client's parents.	see parent	N/A	IncludedInOriginal				7
1025	81	1025#81	1025	Detention	Detention		System must allow user to record detailed information when a GEP client commits the new crime and/or violates their probation.	see parent	N/A	IncludedInOriginal				7
1025	82	1025#82	1025	Detention	Detention		System must allow user to record court order for a GEP client who commits new crime and/or violates their probation and/or conditions.	see parent	N/A	IncludedInOriginal				3
1025	83	1025#83	1025	Detention	Detention		System must allow user to record transfer of a GEP client back to Phase 1 as a result of violation of probation conditions and/or conditions of probation.	see parent	N/A	IncludedInOriginal				5
1025	84	1025#84	1025	Detention	Detention		System must change the status of a GEP client when the client is transferred back to Phase 1 as a result of violation of probation conditions and/or conditions of probation.	see parent	N/A	IncludedInOriginal				6
1025	85	1025#85	1025	Detention	Detention		System must notify user when a GEP client is approaching the end of the sentenced duration for the program.	see parent	N/A	IncludedInOriginal				5
1025	86	1025#86	1025	Detention	Detention		System must allow the user to record a GEP client's eligibility to move to GEP Aftercare.	see parent	N/A	IncludedInOriginal				5
1025	87	1025#87	1025	Detention	Detention		System must allow user to transfer a GEP client to GEP Aftercare.	see parent	N/A	IncludedInOriginal				5
1025	88	1025#88	1025	Detention	Detention		System must change the status of a client when the client is transferred from GEP to GEP Aftercare.	see parent	N/A	IncludedInOriginal				6
1025	89	1025#89	1025	Detention	Detention		System must allow the user to record detailed information when a client is moved to GEP Aftercare.	see parent	N/A	IncludedInOriginal				5
1025	90	1025#90	1025	Detention	Detention		System must allow user to record the school placement for a client when the client is moved to GEP Aftercare.	see parent	N/A	IncludedInOriginal				5
1025	91	1025#91	1025	Detention	Detention		System must allow the user to assign a counselor to a GEP Aftercare client.	see parent	N/A	IncludedInOriginal				7
1025	92	1025#92	1025	Detention	Detention		System must allow user to record detailed information when a GEP Aftercare client opts for NSDFC provided.	see parent	N/A	IncludedInOriginal				5
1025	93	1025#93	1025	Detention	Detention		System must allow user to record detailed information for sessions/therapy attended by the GEP Aftercare client.	see parent	N/A	IncludedInOriginal				7
1025	94	1025#94	1025	Detention	Detention		System must allow user to record detailed information for the mandated therapeutic session for a GEP Aftercare client.	see parent	N/A	IncludedInOriginal				7
1025	95	1025#95	1025	Detention	Detention		System must allow user to record detailed information for randomly performed drug test on GEP Aftercare client.	see parent	N/A	IncludedInOriginal				7
1025	96	1025#96	1025	Detention	Detention		System must allow user to record detailed information on court reviews for a GEP Aftercare client every month.	see parent	N/A	IncludedInOriginal				7

1025	97	1025#97	1025	Detention	Detention		System must allow the user to transfer a GEP Aftercare client back to GEP phase or Phase 1 vendor GEP Aftercare client violates conditions and/or	see parent	N/A	IncludedInOriginal			5
1025	98	1025#98	1025	Detention	Detention		System must allow the user to record a GEP Aftercare client's eligibility to graduate from GEP Aftercare.	see parent	N/A	IncludedInOriginal			5
1025	99	1025#99	1025	Detention	Detention		System must notify user when a GEP Aftercare client is eligible to graduate.	see parent	N/A	IncludedInOriginal			5
1025	100	1025#100	1025	Detention	Detention		System must change the status for a GEP Aftercare client when the client graduates.	see parent	N/A	IncludedInOriginal			6
1025	101	1025#101	1025	Detention	Detention		System must allow user to terminate the program for a GEP Aftercare client when the client graduates.	see parent	N/A	IncludedInOriginal			5
1025	102	1025#102	1025	Detention	Detention		System must allow user to record detailed information about the client's performance and behavior when the client is a NSDGF.	see parent	N/A	IncludedInOriginal			5
1025	103	1025#103	1025	Detention	Detention		System must allow user to record performance and behavioral information daily for a client in NSDGF.	see parent	N/A	IncludedInOriginal			5
1025	104	1025#104	1025	Detention	Detention		System must allow user to record performance and behavioral information weekly for a client in NSDGF.	see parent	N/A	IncludedInOriginal			5
1025	105	1025#105	1025	Detention	Detention		System must allow user to record performance and behavioral information monthly for a client in NSDGF.	see parent	N/A	IncludedInOriginal			5
1025	106	1025#106	1025	Detention	Detention		System must allow user to record Maximum Probation Time for a client sentenced to NSDGF.	see parent	N/A	IncludedInOriginal			5
1025	107	1025#107	1025	Detention	Detention		System must notify user when an NSDGF client is approaching the end of Maximum Probation Time.	see parent	N/A	IncludedInOriginal			5
1025	108	1025#108	1025	Detention	Detention		System must allow user to add additional time to Maximum Probation Time when a client violates conditions and/or commits new violations.	see parent	N/A	IncludedInOriginal			5
1025	109	1025#109	1025	Detention	Detention		System must allow user to recommend reducing time from Maximum Probation Time for a client considering good behavior.	see parent	N/A	IncludedInOriginal			5
1025	110	1025#110	1025	Detention	Detention		System must allow user to reduce time from Maximum Probation Time for a client following a court order.	see parent	N/A	IncludedInOriginal			5
1025	111	1025#111	1025	Detention	Detention		System must allow user to record detailed information on Incident Report when a client commits minor infraction.	see parent	N/A	IncludedInOriginal			5
1025	112	1025#112	1025	Detention	Detention		System must allow user to reduce hours from a client's home pass when a client commits minor infraction and an Incident Report is	see parent	N/A	IncludedInOriginal			5
1025	113	1025#113	1025	Detention	Detention		System must allow user to record detailed information on Due Process Ticket when a client commits minor infraction.	see parent	N/A	IncludedInOriginal			5
1025	114	1025#114	1025	Detention	Detention		System must allow the user to record Due Process Ticket in place of Incident Report when a client commits minor infraction.	see parent	N/A	IncludedInOriginal			5
1025	115	1025#115	1025	Detention	Detention		System must allow user to reduce hours from a client's home pass that client commits minor infraction and Due Process Ticket is logged.	see parent	N/A	IncludedInOriginal			5
1025	116	1025#116	1025	Detention	Detention		System must allow user to record/transfer information from a physical Due Process Ticket to the system in an electronic format for a client in NSDGF commits the minor	see parent	N/A	IncludedInOriginal			5
1025	117	1025#117	1025	Detention	Detention		System must allow user to record detailed information Incident Report when a client in NSDGF commits a major infraction.	see parent	N/A	IncludedInOriginal			5
1025	118	1025#118	1025	Detention	Detention		System must allow user to record transfer of a client in NSDGF to Juvenile Detention Hall with a client commits a minor infraction.	see parent	N/A	IncludedInOriginal			5
1025	119	1025#119	1025	Detention	Detention		System must allow user to record detailed information when a client in NSDGF is temporarily transferred to Juvenile Detention Hall.	see parent	N/A	IncludedInOriginal			5
1025	120	1025#120	1025	Detention	Detention		System must allow user to record the duration for which the client in NSDGF is temporarily transferred to Juvenile Detention Hall.	see parent	N/A	IncludedInOriginal			5
1025	121	1025#121	1025	Detention	Detention		System must allow user to file new charges for a client in NSDGF when the client has committed a major infraction.	see parent	N/A	IncludedInOriginal			3
1025	122	1025#122	1025	Detention	Detention		System must change the status for a client in NSDGF when the client is temporarily transferred to Juvenile Detention Hall as a result of committing	see parent	N/A	IncludedInOriginal			6
1025	123	1025#123	1025	Detention	Detention		System must allow user to record probation violation for a client in NSDGF when the client has committed a major infraction.	see parent	N/A	IncludedInOriginal			7
1025	124	1025#124	1025	Detention	Detention		System must allow user to generate reports for a client for their performance and behavior when the client is a NSDGF.	see parent	N/A	IncludedInOriginal			6
1025	125	1025#125	1025	Detention	Detention		System must allow user to generate reports for multiple clients on their performance and behavior for the clients in NSDGF.	see parent	N/A	IncludedInOriginal			6

1025	126	1025#126	1025	Detention	Detention		System must allow multiple users to record notes/information for each client act NSDFG on their performance and behavior for the weekly Multidisciplinary Team	see parent	N/A	IncludedInOriginal				6
1025	127	1025#127	1025	Detention	Detention		System must allow user to generate report on the client's performance and behavior daily, weekly, and/or monthly as NSDFG	see parent	N/A	IncludedInOriginal				6
1025	128	1025#128	1025	Detention	Detention		System must allow user to view performance and behavior for all clients as NSDFG	see parent	N/A	IncludedInOriginal				6
1025	129	1025#129	1025	Detention	Detention		System must allow user to record detailed information on mandatory programs for NSDFG client to attend as home pass	see parent	N/A	IncludedInOriginal				7
1025	130	1025#130	1025	Detention	Detention		System must maintain traceable log for all mandatory programs for NSDFG client on home pass	see parent	N/A	IncludedInOriginal				7
1025	131	1025#131	1025	Detention	Detention		System must maintain traceable log for attendance in all mandatory programs for NSDFG client on home pass	see parent	N/A	IncludedInOriginal				7
1025	132	1025#132	1025	Detention	Detention		System must allow user to record detailed information about internal programs required by NSDFG	see parent	N/A	IncludedInOriginal				7
1025	133	1025#133	1025	Detention	Detention		System must allow user to record NSDFG client's attendance in external programs	see parent	N/A	IncludedInOriginal				7
1025	134	1025#134	1025	Detention	Detention		System must allow user to record NSDFG client's attendance in internal programs	see parent	N/A	IncludedInOriginal				7
1025	135	1025#135	1025	Detention	Detention		System must allow user to record detailed information on the therapy session required by NSDFG	see parent	N/A	IncludedInOriginal				7
1025	136	1025#136	1025	Detention	Detention		System must allow user to the NSDFG client's family's attendance for the required therapy session	see parent	N/A	IncludedInOriginal				7
1025	137	1025#137	1025	Detention	Detention		System must allow user to record detailed information on school attendance for a client at NSDFG for all phases of detention	see parent	N/A	IncludedInOriginal				5
1025	138	1025#138	1025	Detention	Detention		System must allow user to record detailed information about field trips and/or outings for a Phase 1 client at NSDFG	see parent	N/A	IncludedInOriginal				5
1025	139	1025#139	1025	Detention	Detention		System must allow user to record temporary release of Phase 1 client NSDFG for field trip and/or outing	see parent	N/A	IncludedInOriginal				5
1025	140	1025#140	1025	Detention	Detention		System must allow user to record information about the person to whom the Phase 1 client is temporarily released from NSDFG for field trips and/or outings	see parent	N/A	IncludedInOriginal				5
1025	141	1025#141	1025	Detention	Detention		System must allow user to record detailed information when the client is temporarily released to the client's parent(s)/legal guardian(s) from NSDFG for field trip	see parent	N/A	IncludedInOriginal				5
1025	142	1025#142	1025	Detention	Detention		System must calculate the eligibility for their first home pass for the client in NSDFG based on the minimum duration of their stay at NSDFG	see parent	N/A	IncludedInOriginal				5
1025	143	1025#143	1025	Detention	Detention		System must allow user to record detailed information about the home pass attended by a client as NSDFG	see parent	N/A	IncludedInOriginal				5
1025	144	1025#144	1025	Detention	Detention		System must calculate the eligibility for the first 48 hour home pass for a client in NSDFG based on the number of previous home passes attended	see parent	N/A	IncludedInOriginal				5
1025	145	1025#145	1025	Detention	Detention		System must notify user when the client in NSDFG is eligible for a home pass	see parent	N/A	IncludedInOriginal				5
1025	146	1025#146	1025	Detention	Detention		System must allow user to record temporary release of the client in NSDFG for a predetermined duration of home pass	see parent	N/A	IncludedInOriginal				5
1025	147	1025#147	1025	Detention	Detention		System must allow user to record 4-hour home pass for an NSDFG client	see parent	N/A	IncludedInOriginal				5
1025	148	1025#148	1025	Detention	Detention		System must allow user to record 6-hour home pass for an NSDFG client	see parent	N/A	IncludedInOriginal				5
1025	149	1025#149	1025	Detention	Detention		System must allow user to record 24-hour home pass for an NSDFG client	see parent	N/A	IncludedInOriginal				5
1025	150	1025#150	1025	Detention	Detention		System must allow user to record 48-hour home pass for an NSDFG client	see parent	N/A	IncludedInOriginal				5
1025	151	1025#151	1025	Detention	Detention		System must allow user to record completion/failure of a home pass for NSDFG client	see parent	N/A	IncludedInOriginal				5
1025	152	1025#152	1025	Detention	Detention		System must maintain traceable log for all the home passes attended by an NSDFG client	see parent	N/A	IncludedInOriginal				5
1025	153	1025#153	1025	Detention	Detention		System must allow user to record information by NSDFG client before leaving for home pass	see parent	N/A	IncludedInOriginal				5
1025	154	1025#154	1025	Detention	Detention		System must allow user to record detailed information for phone calls made between officer and NSDFG client as home pass	see parent	N/A	IncludedInOriginal				7
1025	155	1025#155	1025	Detention	Detention		System must allow user to record detailed information on the various types of drug tests performed on the NSDFG client	see parent	N/A	IncludedInOriginal				7
1025	156	1025#156	1025	Detention	Detention		System must allow user to record details on drug tests for an NSDFG client at any time, and on a number of times	see parent	N/A	IncludedInOriginal				7
1025	157	1025#157	1025	Detention	Detention		System must maintain traceable log for the drug tests performed on an NSDFG client	see parent	N/A	IncludedInOriginal				7
1025	158	1025#158	1025	Detention	Detention		System must allow user to generate a report on drug test details for the NSDFG clients	see parent	N/A	IncludedInOriginal				6

1025	159	1025#159	1025	Detention	Detention		System must allow user to record the results of drug tests performed for an NSDPG client.	see parent	N/A	IncludedInOriginal			7
1025	160	1025#160	1025	Detention	Detention		System must maintain traceable log for results of drug tests performed on NSDPG clients.	see parent	N/A	IncludedInOriginal			7
1025	161	1025#161	1025	Detention	Detention		System must allow user to record detailed information on phone call from the client to their supervisor/assigned officer when the NSDPG client is on home pass at facility.	see parent	N/A	IncludedInOriginal			7
1025	162	1025#162	1025	Detention	Detention		System must allow user to record detailed information on the phone call required by the client to their supervisor/assigned officer when the NSDPG client is on home pass at facility.	see parent	N/A	IncludedInOriginal			7
1025	163	1025#163	1025	Detention	Detention		System must allow user to record detailed information on the phone calls that clients make while they are at facility.	see parent	N/A	IncludedInOriginal			7
1025	164	1025#164	1025	Detention	Detention		System must allow user to record detailed information on the mandatory phone calls that the client is to make while they are at facility.	see parent	N/A	IncludedInOriginal			7
1025	165	1025#165	1025	Detention	Detention		System must allow user to record detailed information on the phone calls received by the client when the client is at facility.	see parent	N/A	IncludedInOriginal			7
1025	166	1025#166	1025	Detention	Detention		System must allow user to record detailed information on phone calls made to NSDPG client on home pass at facility.	see parent	N/A	IncludedInOriginal			7
1025	167	1025#167	1025	Detention	Detention		System must allow user to record detailed information on all the phone calls made and received by NSDPG client.	see parent	N/A	IncludedInOriginal			7
1025	N/A	1025	1025	Detention	Detention		See Supplement: Non-Secure Detention Facility for Girls	200	See itemized	IncludedInOriginal			5
1027	0	1027	N/A	Detention	Detention		Need LGBT Tab	96	04/21/15 - Since there are no requirements at this time, here are the assumptions made: 1. Assume that there will be a corresponding summary and detail screens in the Detention or Client Info module that will have the LGBT information. 2. Since the detailed requirements are not available, the estimates could vary depending on the complexity of the	IncludedInOriginal			5
1030	0	1030#0	N/A	Detention	Detention	Property Release Information	System must allow user to capture electronic signature from external device like signature pad.	120	Customization will include the interface with an electronic signature pad (like Topas or other similar device). Hardware costs included.	IncludedInOriginal			5
1034	1	1034#1	1034	Detention	Detention	Mass Physical Exam Summary	System must allow users to record when a client has made a request to contact DPO and/or Medical assistance.	12	Possibly enter this information of the client request for medical assistance on the grievance screen. Workflow can be created to trigger the	IncludedInOriginal			5
1034	2	1034#2	1034	Detention	Detention		System must allow user to track the client request for contacting DPO and/or Medical assistance.	see parent	N/A	IncludedInOriginal			5
1034	3	1034#3	1034	Detention	Detention		System must notify users when a client has made a request to contact DPO and/or Medical assistance.	see parent	N/A	IncludedInOriginal			6
1040	N/A	1040	1040	Detention	Detention	Entrance, Movement, and Release Summary	REQ related to camps, included in "nonsecure detention facility for girls" Sup.Doc	see Gap ID 1025	SMC to clarify, no reference to this req id in Intake Status document	IncludedInOriginal			5
1042	0	1042#0	N/A	Detention	Detention		No software change req'd. Can the system create an Alert when a client is committed to Camp that an orientation is due? Typically completed prior to the client	duplicate		IncludedInOriginal			Closed
1045	N/A	1045	516	Detention	Detention	Hall Resident Head Count Information	See Supplement: Hall Resident Head Count Information	32	See 516#6, 516#7	IncludedInOriginal			5

1050	N/A	1050	2	Detention	Detention	Hall Shift Summary History	See Supplement: Shift Summary	64	1. System should display all of the staffs name working in that shift - will be new fields on the Shift Summary information (finder or dropdowns) listing all the locations, units and staff 2. System should allow user to filter their (Shift Summary) search by shift, date, staff, and unit - will extend the sort feature to the shift summary screen 3. User should have the ability to generate a Shift Summary report - this will be handled as part of the reports development. 4. System should allow user to select shift type - current functionality 5. System should allow user to select shift date - current functionality 6. System should allow user to select multiple	IncludedInOriginal			5
1058	1	1058#1	1058	Detention	Detention		System must allow user to record and manage a list of approved visitors.	see parent	interested parties and family screens have approved visitor flag - current functionality	IncludedInOriginal			5
1058	2	1058#2	1058	Detention	Detention		System must allow user to record the check-in time of the visitor	see parent	N/A	IncludedInOriginal			5
1058	3	1058#3	1058	Detention	Detention		System must allow user to record the check-out time of the visitor	see parent	N/A	IncludedInOriginal			5
1058	4	1058#4	1058	Detention	Detention		System must allow user to generate a report (log) of every approved visitor who visited the detention facility	see parent	this will be handled as part of the report requirement	IncludedInOriginal			6
1058	5	1058#5	1058	Detention	Detention		System must notify user when the status of an approved visitor changes.	see parent	when the person is no longer an approved visitor, the flag can be unchecked. - current functionality SMC - We would like to get an alert if a visitor is no longer allowed to visit. Also, only allow DPO's and ISM and Directors to be allowed to approve and suspend	IncludedInOriginal			6
1058	N/A	1058	1058	Detention	Detention	Interested Parties Information	See Supplement: Tracking Visitors	60	A new summary and detail screen will be added to track the visitor check-in and check-out times. The visitor list will be validated against the approved visitor flag from the family/interested	IncludedInOriginal			5
1074	N/A	1074	1025	Juvenile	Detention		See Supplement: non secure detention facility for girls	See parent		IncludedInOriginal			5
1086	1	1086#1	1086	Detention	Detention	New Screen	System must allow user to record information for periodic safety room check for the pre-determined time intervals	see parent	See parent	IncludedInOriginal			5
1086	2	1086#2	1086	Detention	Detention	New Screen	System must record the name of the user who performed the periodic safety room check	see parent	See parent	IncludedInOriginal			5
1086	3	1086#3	1086	Detention	Detention	New Screen	System must record the actual time of periodic safety room check completed by the user	see parent	See parent	IncludedInOriginal			5
1086	4	1086#4	1086	Detention	Detention	New Screen	System must allow user to view the log of all the periodic safety room check performed by a user for a specific date	see parent	See parent	IncludedInOriginal			5
1086	5	1086#5	1086	Detention	Detention	New Screen	System not allow user to edit any information and notes for the periodic safety room check	see parent	See parent	IncludedInOriginal			5
1086	6	1086#6	1086	Detention	Detention	New Screen	System must notify user when a periodic safety room check was not performed at the predetermined time	see parent	See parent	IncludedInOriginal			5
1086	7	1086#7	1086	Detention	Detention	New Screen	System must notify user when the pre-determined time interval has passed for a periodic safety room check	see parent	See parent	IncludedInOriginal			5
1086	8	1086#8	1086	Detention	Detention	New Screen	System must allow user to record notes when the user was late on a check or missed a periodic safety room check	see parent	See parent	IncludedInOriginal			5
1086	9	1086#9	1086	Detention	Detention	New Screen	System must allow user to select a reason for performing a late periodic safety room check or missing a periodic safety room check from a select list	see parent	See parent	IncludedInOriginal			5
1086	10	1086#10	1086	Detention	Detention	New Screen	System must allow user to generate report for periodic safety room check for each unit including the reason for staff to perform late check and/or missed check	see parent	See parent	IncludedInOriginal			5
1086	11	1086#11	1086	Detention	Detention	New Screen	System must allow user to generate report for periodic safety room check for each shift including the reason for staff to perform late check and/or missed check	see parent	See parent	IncludedInOriginal			5
1086	12	1086#12	1086	Detention	Detention	New Screen	System must allow user to extract periodic safety room check log to excel	see parent	See parent	IncludedInOriginal			5
1086	13	1086#13	1086	Detention	Detention	New Screen	System must make periodic safety room check available to user until it has been deleted for action	see parent	See parent	IncludedInOriginal			5
1086	N/A	1086	1086	Detention	Detention	New Screen	See Supplement: Periodic Safety Room Check	120	Customization - Create a new screen to allow for logging the safety room checks for the pre-determined intervals. Lock the screen for edits depending on the rules provided by SMC. Create new workflows to allow for the automatic alerts for late checks. Track reasons for late checks. Reports will be part of	IncludedInOriginal			5
1087	1	1087#1	1087	Detention	Detention	Intake	System must allow user to record detailed information for the client when the client is transferred to Temporary Housing in Detention Facility	see parent	See parent	IncludedInOriginal			5



1087	2	1087#2	1087	Detention	Detention	Intake	System must allow user to record the start date and time for a client when the client is transferred to Temporary Housing at Detention Facility.	see parent	See parent	IncludedInOriginal			5
1087	3	1087#3	1087	Detention	Detention	Intake	System must allow user to record the reason for the temporary housing for a client at Detention Facility.	see parent	See parent	IncludedInOriginal			5
1087	4	1087#4	1087	Detention	Detention	Intake	System must allow user to record details of the Agency for whom the client is held for at the Temporary Housing at Detention Facility.	see parent	See parent	IncludedInOriginal			5
1087	5	1087#5	1087	Detention	Detention	Intake	System must allow user to record notes and comments for a client and the case when the client is at Temporary Housing at Detention Facility.	see parent	See parent	IncludedInOriginal			5
1087	6	1087#6	1087	Detention	Detention	Intake	System must calculate the number of days the client's stay at the Temporary Housing at Detention Facility and not including holidays and weekends.	see parent	See parent	IncludedInOriginal			5
1087	7	1087#7	1087	Detention	Detention	Intake	System must notify user when the client has stayed for more than a pre-determined number of days at the Temporary Housing at Detention Facility.	see parent	See parent	IncludedInOriginal			5
1087	8	1087#8	1087	Detention	Detention	Intake	System must notify user when the client has stayed for pre-determined number of days minus one business day (One business day before pre-determined number of days) at Temporary Housing at Detention Facility.	see parent	See parent	IncludedInOriginal			5
1087	9	1087#9	1087	Detention	Detention	Intake	System must allow user to record detailed information on the release of the client to the Agency requesting hold when the client is at Temporary Housing at Detention Facility.	see parent	See parent	IncludedInOriginal			5
1087	10	1087#10	1087	Detention	Detention	Intake	System must allow user to record detailed information when the pre-determined number of days have passed for the client's stay and the county has to release the client from Temporary Housing at Detention Facility.	see parent	See parent	IncludedInOriginal			5
1087	N/A	1087	1087	Detention	Detention	New Screen	See Supplement: Temporary Housing in Detention Facility	84	Customization - Courtesy Hold clients can be entered via Special Admission screen. Detention module need to be modified to accept clients intake through Special Admission screen. The status for such clients can be set accordingly so the clients can be flagged. Case notes can be entered for these clients Temporary stay will be calculated based on the admission date and might need additional fields or screen to display the information (not including holidays and weekends). Workflows need to be set up for any notifications pertaining	IncludedInOriginal			5
1088	1	1088#1	1088	Adult	Detention		System must allow user to record details on the sentence for the client who will be serving at detention center at the weekends. Details will include client's name, time to be served, start date, end date, special instructions, and any additional			EstimatedAsNetNew			5
1088	2	1088#2	1088	Adult	Detention		System must allow user to print a report for all the clients who will be at the detention center for the weekend.			EstimatedAsNetNew			5
1088	3	1088#3	1088	Adult	Detention		System must allow user to record the validation for the weekend client at intake.			EstimatedAsNetNew			5
1088	4	1088#4	1088	Adult	Detention		System must allow user to record expected release date for weekend client.			EstimatedAsNetNew			5
1088	5	1088#5	1088	Adult	Detention		System must allow user to record details for each weekend separately if the sentence requires time to be served over weekend.			EstimatedAsNetNew			5
1088	6	1088#6	1088	Adult	Detention		System must allow user to record intake time and release time for each time the client serves time as a weekend.			EstimatedAsNetNew			5
1088	7	1088#7	1088	Adult	Detention		System must account the time served during the weekend by the client against both their "Accumulated Custody Time" (Max Time") and court order weekend			EstimatedAsNetNew			5
1088	N/A	1088	1088	Adult	Detention	Community Service Case Info	See Supplement: Weekender Clients			EstimatedAsNetNew		80	5

1089	1	1089#1	1089	Detention	Detention	System must allow user to perform intake on a Camp Glenwood client as "Voluntary Respite" in the Youth Service Center (YSC) or Camp Glenwood at any time while they are on Parloough or in Aftercare	PendingEstimate		5
1089	2	1089#2	1089	Detention	Detention	System must allow user to perform intake on a Camp Kemp client (girls program) as "Voluntary Respite" in Youth Service Center or Camp Kemp at any time when they are in Phase 2 or	PendingEstimate		5
1089	3	1089#3	1089	Detention	Detention	System must allow the user (GS/ISM) to perform intake for a client without entering any charges or probation violation.	PendingEstimate		5
1089	4	1089#4	1089	Detention	Detention	System must allow the user (ISM/GS) to perform intake on a client as Voluntary Respite into the YSC and then schedule them to be moved to Camp (Glenwood or Kemp) without being detained	PendingEstimate		5
1089	5	1089#5	1089	Detention	Detention	System must allow user (ISM/GS) to record the housing for a client in a detainment	PendingEstimate		5
1089	6	1089#6	1089	Detention	Detention	System must allow user to record the belongings of a Voluntary Respite client in all camps and YSC	PendingEstimate		5
1089	7	1089#7	1089	Detention	Detention	System must allow user (GS/ISM) to record release of client's belongings to them from the Camps and the YSC	PendingEstimate		5
1089	8	1089#8	1089	Detention	Detention	System must allow user (GS/ISM) to record behavioral points for a client while they are on Voluntary Respite	PendingEstimate		5
1089	9	1089#9	1089	Detention	Detention	System must allow user (GS/ISM) to create an incident report for all Voluntary Respite clients	PendingEstimate		5
1089	10	1089#10	1089	Detention	Detention	System must allow user (GS/ISM/PO) to enroll a Voluntary Respite client in any Program offered at the YSC or either Camp (Glenwood or Kemp)	PendingEstimate		7
1089	11	1089#11	1089	Detention	Detention	System must allow user (ISM/GS/PO) to record transport of a Voluntary Respite client to and from YSC for detainment	PendingEstimate		5
1089	12	1089#12	1089	Detention	Detention	System must allow user (GS/ISM/DPO) to record transport of a Voluntary Respite client to and from the YSC for non-detainment	PendingEstimate		5
1089	13	1089#13	1089	Detention	Detention	System must not account (add) the stay time of a client in Voluntary Respite client (YSC or Camp) towards their Confinement Time	PendingEstimate		3
1089	14	1089#14	1089	Detention	Detention	System must allow user to pause Electronic Monitoring Detainment time (EMP) for a client when they are on Voluntary Respite	PendingEstimate		7
1089	15	1089#15	1089	Detention	Detention	System must allow user to restart EMP Commitment time for a client after they have completed Voluntary Respite	PendingEstimate		7
1089	16	1089#16	1089	Detention	Detention	System must allow user to edit (extend or reduce) the EMP confinement time of a client	PendingEstimate		7
1089	17	1089#17	1089	Detention	Detention	System must allow user to record release of a Voluntary Respite client at any time from YSC or Camp	PendingEstimate		5
1089	N/A	1089	1089	Detention	Detention	See Supplement: Voluntary Respite	PendingEstimate	40	5
Original Hours							Revised Estimates		
1624							144		

Total Customization Hours  
PM Hours  
BA/QA/Architect/DBA  
Total Estimated Hours

1856.4  
278  
371  
2505

# ATTACHMENT D - CUSTOMIZATIONS - WORK PACKAGE ENHANCEMENT DETAILS

## Work Package 6 - Assessment, Case Plan, Placement, Reports, & Common

Gap.ID	HLR ID/Sub.ID	Gap.ID #Sub.ID	Refer Parent	Area	Module	Screen	High Level Requirement Description	Capita's Original Estimate (hours)	Capita's comments	Estimate on Status	Capita Updated?	Revised Estimates (hours)	SMC Proposed W.Package
3	0	3#0	N/A	Juvenile	Common	At a Glance	Request an icon or hyperlinks that list out the last X (5-10) number of clients that we've worked on for easy access and navigation	32	Add a hyperlink below the client no hyperlink to show the past 5 clients searched	Included InOriginal			6
14	1	14#1	14	Detention	AssessmentAndCasePlan		System must notify users to initiate Assessment Treatment Plan when client has been in custody for 30 days.	see parent	new workflow	Included InOriginal			6
14	2	14#2	14	Detention	AssessmentAndCasePlan		System must generate case note automatically when 30 Day Assessment Treatment Plan is due.	see parent	Question - should this be a case note or an alert which can be added as part of the new workflow?	Included InOriginal			6
14	3	14#3	14	Detention	AssessmentAndCasePlan		System must allow user to generate report for all clients in custody past due for the 30 Day Assessment Treatment Plan.		This will be part of reports customization	Included InOriginal			6
14	4	14#4	14	Detention	AssessmentAndCasePlan		System must allow user to print Due for 30 Day Assessment Treatment Plan report.		This will be part of reports customization	Included InOriginal			6
14	5	14#5	14	Detention	AssessmentAndCasePlan		System must allow user to record information (School History, Alcohol and Drug Use, Health and Medical, Mental Health Issues, Family Relations, Gang Involvement, General Life) in the 30 Day Assessment Treatment Plan.	see parent	Capita is assuming that most of the information can be captured in the Client Info module. Assessment Form can be generated using the form templates within PIMS. For data that already exists in the system, the data can be pre-populated to the template. For the data that is not captured in PIMS, user will enter the data on the form before generating the PDF. The effort is to add the existing database fields to the static data elements list so the form can be mapped.	Included InOriginal			6
14	6	14#6	14	Detention	AssessmentAndCasePlan		System must allow user to generate report for the completed Assessment Treatment Plans per month by unit.		this will be handled as part of the reports customizations	Included InOriginal			6

14	N/A	14	14	Detention	AssessmentAndCasePlan	Screening Information	See Supplement: Assessment and Case Plan	24	N/A	Included InOriginal			4
16	0	16#0	N/A	Adult	AssessmentAndCasePlan	Assessment History	System must allow user to enter the following CAIS information: CAIS completion date, Initial Assessment/Reassessment, CAIS Risk Level, CAIS score, and CAIS category.	0	Assumption - Currently, PIMS has the option to capture external assessment information including the type of assessment, assessment start and end dates, risk level and individual scores for each domains or risk categories. The assumption is that the same screen will be used to capture the CAIS information without any modifications, whether it is via an interface or entered by the user. The effort for the actual interface development would be included under interfaces.	Included InOriginal			6
17	N/A	17	14	Detention	AssessmentAndCasePlan	Assessment History	See Supplement: Assessment and Case Plan	56	N/A	Included InOriginal			4
18	N/A	18	14	Detention	AssessmentAndCasePlan	Assessment History	See Supplement: Assessment and Case Plan	0	see ID 14	Included InOriginal			4
21	1	21#1	21	Adult	Common		Name	see parent		Included InOriginal			6
21	2	21#2	21	Adult	Common		Juvenile Case Status: Ward, Dependent, Dual Status, CSEC, Direct File, 654.2, 725(A), DEJ, Intervention Contract, Informal) & Date Status Was Ordered	see parent		Included InOriginal			6
21	3	21#3	21	Adult	Common		Sheriff's Office Number: Numerical	see parent		Included InOriginal			6
21	4	21#4	21	Adult	Common		School: School	see parent		Included InOriginal			6
21	5	21#5	21	Adult	Common		Alerts	see parent		Included InOriginal			6
21	6	21#6	21	Adult	Common		Ethnicity: Pull From Ethnicity Field	see parent		Included InOriginal			6
21	7	21#7	21	Adult	Common		Address: (Residential)	see parent		Included InOriginal			6

21	8	21#8	21	Adult	Common		Maximum Confinement Time + Days Served In Detention: (Breakdown If There Are Other Days In Other Counties):	see parent		Included InOriginal			6
21	9	21#9	21	Adult	Common		Juvenile Probation Conditions	see parent		Included InOriginal			6
21	10	21#10	21	Adult	Common		Current Location Of Youth	see parent		Included InOriginal			6
21	11	21#11	21	Adult	Common		Mug Shot	see parent		Included InOriginal			6
21	12	21#12	21	Adult	Common		Institution Unit Location: F1, F2, F3, P4, P5, E6, E7, Admin, Glenwood, Dorms, Sections (1)(2)(3)(4)	see parent		Included InOriginal			6
21	13	21#13	21	Adult	Common		Phone Number	see parent		Included InOriginal			6
21	14	21#14	21	Adult	Common		Gang Affiliation	see parent		Included InOriginal			6
21	15	21#15	21	Adult	Common		Pending Juvenile Cases	see parent		Included InOriginal			6
21	16	21#16	21	Adult	Common		Juvenile Court Number	see parent		Included InOriginal			6
21	17	21#17	21	Adult	Common		Active Adult Cases: List Of Cases, Case Numbers (Hyperlink To Case's Filing Screen), Case Status, Case Type, Estimated Termination Date, Next Court Date	see parent		Included InOriginal			6
21	18	21#18	21	Adult	Common		DOB	see parent		Included InOriginal			6
21	19	21#19	21	Adult	Common		DPO (PO) AND PSM (SPO)	see parent		Included InOriginal			6
21	20	21#20	21	Adult	Common		Enhanced Juvenile Detention Supervision: Suicide Watch, Ice Hold, Escape Risk, Homicidal/Assaultive, Close Observation (1)(2)(3)	see parent		Included InOriginal			6
21	21	21#21	21	Adult	Common		Date Admitted To Custody: Date, Month (Mm), Day (Dd), Year (Yyyy)	see parent		Included InOriginal			6
21	22	21#22	21	Adult	Common		Description Of Youth: Height, Weight, Skin/Eye/Hair Color	see parent		Included InOriginal			6
21	23	21#23	21	Adult	Common		PIMS Number	see parent		Included InOriginal			6

21	24	21#24	21	Adult	Common		School Grade: K-12	see parent		Included InOriginal			6
21	25	21#25	21	Adult	Common		Gender: Male, Female	see parent		Included InOriginal			6
21	26	21#26	21	Adult	Common		Age	see parent		Included InOriginal			6
21	N/A	21	21	Adult	Common	Client at a Glance	See Supplement: At-A-Glance	see Gap.ID 256, 257, 258		Included InOriginal			6
41	N/A	41	21	Adult	Common	Client at a Glance	See Supplement: At-A-Glance	see Gap.ID 21	N/A	Included InOriginal			6
256	N/A	256	21	Detention	Common	Client at a Glance	See Supplement: At-A-Glance	40	The existing atagance screen will be modified to include all the must have fields as indicated in the supplemental document. Some of the fields are already on the existing screen and some are captured on the common header above the screen. Those that are already on the common header will not be duplicated again on the atagance screen.	Included InOriginal			6
257	N/A	257	21	Detention	Common	Client at a Glance	See Supplement: At-A-Glance	40	All the nice to have items on the supplemental document can be added as long as the information is already caputred within PIMS. The exact criteria for populating these fields need to be defined. For instance, "Primary Language of Parents" , is it the biological parents, guardians, and should it be for each of them, etc.	Included InOriginal			6

258	N/A	258	21	Detention	Common	Client at a Glance	See Supplement: At-A-Glance	16	Will modify the app so that the Image will be enlarged when clicked on the existing image on the client header.	Included InOriginal			6
261	N/A	261	21	Adult	Common	Client at a Glance	See Supplement: At-A-Glance	0	Estimates are included in #256 above	Included InOriginal			6
319	1	319#1	319	Adult	Common	Client at a Glance	System must allow user to view photo of the client as an enlarged image.	16	customization. When clicked on the image in the client header, the app will display an enlarged version of the image	Included InOriginal			6
341	1	341#1	341	Juvenile	Placement		System must allow user to record if a client is eligible for Title IV-E.	see parent	customization, need to add a flag or identifier for Title IV-E eligible juveniles SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOriginal			1
341	2	341#2	341	Juvenile	Placement		System must allow user to generate a report for all the Title IV-E eligible clients.	see parent	need to be addressed as part of reports customization SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOriginal			6
341	3	341#3	341	Juvenile	Placement		System must allow user to evaluate a client for eligibility for Title IV-E.	see parent	need requirements for eligibility criteria SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOriginal			6
341	4	341#4	341	Juvenile	Placement		System must notify user to initiate Title IV-E eligibility form when a case is disposed and the minor under 18 years of age is a subject of 602 petition.	see parent	new workflow for notification and form templates can be used for form generation SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOriginal			6

341	5	341#5	341	Juvenile	Placeme nt		System must allow user to complete Title IV-E eligibility form.	see parent	use existing form templates SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	6	341#6	341	Juvenile	Placeme nt		System must allow user to mark/flag a client as Title IV-E eligible when by the completion of "Evaluation of Imminent Risk and Reasonable Candidacy" form for the client determines that the client is eligible for Title IV-E.	see parent	need to add a check or flag on Placement screen in addition to completing the form SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			1
341	7	341#7	341	Juvenile	Placeme nt		System must notify user to complete Title IV-E Pre-Placement Case Plan when a client is marked/flagged as Title IV-E eligible.	see parent	new workflow, Case plan will be a form template SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	8	341#8	341	Juvenile	Placeme nt		System must allow user to record information for Evaluation of Imminent Risk and Reasonable Candidacy form for a client.	see parent	form template SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	9	341#9	341	Juvenile	Placeme nt		System must allow user to record a Case Plan for a client who is eligible for Title IV-E.	see parent	form template SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	10	341#10	341	Juvenile	Placeme nt		System must allow user to evaluate a single client any number of times for eligibility for Title IV-E.	see parent	possibly a new screen for Title IV-E eligibility determination SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	11	341#11	341	Juvenile	Placeme nt		System must notify user to re-evaluate a client for eligibility for Title IV-E at predetermined duration of time.	see parent	new workflow SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6



341	12	341#12	341	Juvenile	Placeme nt		System must allow user to re-evaluate a client for eligibility for Title IV-E when the client was not eligible at a previous evaluation.	see parent	possibly a new screen for Title IV-E eligibility determination SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	13	341#13	341	Juvenile	Placeme nt		System must notify user to re-evaluate a previously non-eligible client for eligibility for Title IV-E at predetermined duration of time.	see parent	new workflow SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	14	341#14	341	Juvenile	Placeme nt		System must associate Case Plan to Title IV-E eligibility form for a client when the client is eligible for Title IV-E.	see parent	form template or existing case plan, need more specifics SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	15	341#15	341	Juvenile	Placeme nt		System must allow each evaluation which determines a client as Title IV-E eligible to be associated to a separate Case Plan.	see parent	use the existing case plan SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	16	341#16	341	Juvenile	Placeme nt		System must pre-populate Case Plan with information from it's associated Title IV-E eligibility form when a client is determined eligible for Title IV-E	see parent	need more specifics SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	17	341#17	341	Juvenile	Placeme nt		System must notify user at regular durations of time to create a new Case Plan.	see parent	new workflow SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	18	341#18	341	Juvenile	Placeme nt		System must allow user to record information about visits for a Case Plan for a client.	see parent	use contacts screen to track visits SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			7

341	19	341#19	341	Juvenile	Placeme nt		System must allow user to record progress of the client when the client is associated with a Case Plan.	see parent	use existing case plan SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
341	N/A	341	341	Juvenile	Placeme nt	Address Summar y	See Supplement: Title IV-E	120	modifications to existing Placement screens, new eligibility screen, case plan (potential updates), new workflow SMC - 4/29/15-TD - Module should be changed to Assessment & Case Plan	Included InOrigin al			6
389	1	389#1	389	Juvenile	Placeme nt	School Informat ion	System must allow user to enter only current and previous dates for the field End Date.	8	Customization ; School Information ; Will add the edit so end date cannot be in the future and has to be after the start date. SMC to confirm that there won't be a future end date for the schools.	Included InOrigin al			6
389	2	389#2	389	Juvenile	Placeme nt		System must not allow user to enter future date to the field End Date.	see parent	N/A	Included InOrigin al			6
396	0	396#0	N/A	Juvenile	Common	Alert Informat ion	SEPARATE AS NEW GAP LINE ITEM: Tracking PV- related bench warrants in PV screen - identify changes.	0	System must allow user to enter a past date (before current system date) for effective date for a probation violation related bench warrant. - Alert Information screen will be modified to enter alert effective dates in the past. This change will be done at no additional charge.	Included InOrigin al			7

413	0	413#0	N/A	Juvenile	Common	Client at a Glance	Duplicate of ID #233	See parent	N/A	Included InOriginal			Closed
427	1	427#1	427	Adult	Common	Case Notes Summary	System must allow user to record supervision information for Special Admission cases.	80	Application will customized so all of Supervision module can be used for Special Admission cases. The screens that have a case number will be modified to show both the regular cases and special admission cases so the information can be recorded against the special admission case in addition to the regular cases. The screens include Probation Violation, Financial Payment, Contacts, Sanctions, Community Service, Services, Case Notes, Conference, and Form Document Summary.	Included InOriginal			6
427	2	427#2	427	Adult	Common		System must allow screens that show regular cases to function the same for Special Admission cases.	see parent	N/A	Included InOriginal			6
431	N/A	431	21	Adult	Common	Client at a Glance	See Supplement: At-A-Glance	see parent	See parent	Included InOriginal			6
432	N/A	432	21	Adult	Common	Client at a Glance	See Supplement: At-A-Glance	see parent	See parent	Included InOriginal			6
436	1	436#1	436	Detention	Common		System must track the duration (in weeks) a client has been in a program starting from the day the client is transported to detention facility.	see parent	can be tracked on the Entrance Movement History (EMR) screen from the admission to the release within the detention facility - current functionality	Included InOriginal			5

436	2	436#2	436	Detention	Common		System must allow user to track the points of each client during their stay at detention facility.	see parent	Merit Points feature can be used to track the points during the detention of the juvenile - current functionality	Included InOriginal			5
436	3	436#3	436	Detention	Common		System must allow user to identify when a client is on a 24-hour home pass.	see parent	home passes can be entered as tasks on Merit Points screen. configuration	Included InOriginal			5
436	4	436#4	436	Detention	Common		System must alert user when a client has been in detention for at least seven (7) weeks and, has earned less than 300 points and, has not been on a 24-hour home pass.	see parent	add a new workflow to trigger the notification	Included InOriginal			5
436	5	436#5	436	Detention	Common		System must alert user when a client qualifies for In-House Discipline Detention Facility	see parent	add a workflow to trigger the notification. Need specifics of the workflow from the county	Included InOriginal			5
436	6	436#6	436	Detention	Common		System must allow user to record the outcome of the meetings with the client in In-House Discipline Detention Facility.	see parent	Add ""Camp Adjustment"" value to Conference Type dropdown on Conference screen.	Included InOriginal			5
436	7	436#7	436	Detention	Common		System must alert user when a client has "failed" the stay at In-House Discipline Detention Facility	see parent	Add Camp Adjustment 2 week review, Camp Adjustment Pass, and Camp Adjustment Fail as Conference Outcome dropdown values. Add workflow to trigger alerts to the staff if the conference outcome is Camp Adjustment Fail.	Included InOriginal			5
436	8	436#8	436	Detention	Common		System must alert user when a client is eligible for an informal hearing with the Presiding Judge at detention facility.	see parent	combine with the workflow above in #7. The email alert to the staff would also indicate that they need to schedule an informal hearing.	Included InOriginal			5

436	9	436#9	436	Detention	Common		System must allow user to record the contract as agreed between the client and the Interested Parties as requirements for the client to complete the In-House Discipline Detention Facility.	see parent	can be part of the workflow in #7	Included InOriginal			5
436	10	436#10	436	Detention	Common		System must allow user to record the minimum number of behavioral points the client needs to accumulate during the client's stay in In-House Discipline Detention Facility.	see parent	points can be recorded using the PIMS merit points screens. Not sure how this requirement is used in reference to merit points. Need more specifics	Included InOriginal			5
436	11	436#11	436	Detention	Common		System must alert user when a client has completed the duration of stay in In-House Discipline Detention Facility.	see parent	will add a workflow to notify the relevant staff of the completed stay	Included InOriginal			5
436	12	436#12	436	Detention	Common		System must alert user when the client has completed the duration of stay in In-House Discipline Detention Facility and has met the minimum requirements of the contract.	see parent	need customization, possibly add to the existing Level information screen in PIMS	Included InOriginal			5
436	13	436#13	436	Detention	Common		System must alert user when the client has completed the duration of stay in In-House Discipline Detention Facility and has not met the minimum requirements of the contract.	see parent	part of the workflow	Included InOriginal			5
436	N/A	436	436	Detention	Common	Conference Summary	See Supplement: In-House Discipline Detention Facility	24	See itemized	Included InOriginal			5
437	N/A	437	436	Detention	Common	Conference Summary	See Supplement: In-House Discipline Detention Facility	40	See parent	Included InOriginal			5

438	N/A	438	436	Detention	Common	Conference Summary	See Supplement: In-House Discipline Detention Facility	0	see Gap.ID 437	Included InOriginal			5
443	N/A	443	N/A	Juvenile	Common	Case note Information	System must generate auto-generated case note when a referral to any service is recorded.			Estimate dAsNetNew		16	7
446	0	446#0	N/A	Juvenile	Common	Client at a Glance	Action Item: Review with other units	duplicate		Included InOriginal			6
669	0	669#0	N/A	Adult	Common		See ID 3	See parent	See parent	Included InOriginal			6
677	0	677#0	N/A	Juvenile	Placement	Placement Information	System must allow user to access Placement Module only if the client has a General Placement Order which is a court order specific to placement unit.	4	Placement module access will be determined by the user access. Will add the condition to link the court order to the Placement module, where user can enter a placement record only if the client has a placement order. Will need the exact court order details from SMC.	Included InOriginal			3
688	0	688#0	N/A	Juvenile	Placement	Placement Summary-School	System must display current school information separate from previously attended schools.	16	Will modify to show only the current schools on the Placement Summary screen	Included InOriginal			6

754	N/A	754	21	Adult	Common	Client at a Glance	See Supplement: At-A-Glance	see parent		Included InOriginal			6
764	0	764#0	N/A	Adult	Common	Dynamic Screens	System must allow users to record, track and share information that are not case related.		The requirements is too broad. Need more specifics as to what information is to be included and which screens they need to be added to. No customization provided at this time.	Pending Estimate			Closed
832	0	832#0	427	Adult	Common	Contact Summary	User needs to document a client contact or incident report without having to choose contact status.	0	System must display cases from both intake and special admissions list. - This requirement was already addressed as part of Req# 427	Included InOriginal			6
1054	1	1054#1	1054	Adult	Common		System must allow user to upload first draft of a court report.	see parent	need customization	Included InOriginal			6
1054	2	1054#2	1054	Adult	Common		System must notify user when first draft of court report is uploaded.	see parent	part of a new workflow	Included InOriginal			6
1054	3	1054#3	1054	Adult	Common		System must allow user to search for and access the draft of the court report.	see parent	all documents are in the context of a client and are found of forms document summary screen.	Included InOriginal			6
1054	4	1054#4	1054	Adult	Common		System must allow user to update, modify, add comments and notes in the draft court report, and save.	see parent	word templates can be updated until the time they are submitted	Included InOriginal			6
1054	5	1054#5	1054	Adult	Common		System must allow user to finalize the draft court report.	see parent	this is done by uploading and submitting the pdf. - Current functionality	Included InOriginal			6
1054	6	1054#6	1054	Adult	Common		System must allow user to indicate finalized court report as ready for distribution.	see parent	N/A	Included InOriginal			6

1054	7	1054#7	1054	Adult	Common		System must allow user to save an updated draft of court report with a new name.	see parent	as part of customization, can allow for the system to create a separate file name for draft version, but the naming convention cannot be controlled by the user.	Included InOriginal			6
1054	8	1054#8	1054	Adult	Common		System must allow user to indicate a draft of court report as "ready for review" to other users.	see parent	need customization	Included InOriginal			6
1054	9	1054#9	1054	Adult	Common		System must not limit the number of times a draft of court report can be updated and saved, until the draft is finalized.	see parent	part of customization	Included InOriginal			6
1054	10	1054#10	1054	Adult	Common		System must not allow user to update after the court report draft is "finalized".	see parent	current functionality	Included InOriginal			6
1054	11	1054#11	1054	Adult	Common		System must allow user to embed/attach/append attachments within the draft court report.		cannot be supported	Pending Confirmation			6
1054	12	1054#12	1054	Adult	Common		tem must allow user to print the finalized court report.	see parent	current functionality	Included InOriginal			6
1054	N/A	1054	1054	Adult	Common	Form Document Summary	See Supplement: Court Report	80	need customization	Included InOriginal			6
1055	1	1055#1	1055	Adult	Reports		System must display Reports Menu items in a logically organized structure. (See proposed solutions)	see parent	See parent	Included InOriginal			6
1055	2	1055#2	1055	Adult	Reports		System must display Reports Sub-menu in a logically organized structure. (See proposed solutions)	see parent	See parent	Included InOriginal			6
1055	N/A	1055	1055	Adult	Reports	Ad Hoc Reports	See Supplement: Reports Menu	40	The reports menu sorting/grouping can be decided once the final list of standard reports are finalized.	Included InOriginal			6



1073	N/A	1073	21	Juvenile	Common		See Supplement: at-a-glance	See parent		EstimatedAsNetNew		TBD	6
1075	1	1075#1	1075	Adult	AssessmentAndCasePlan		System must allow user to assign officers to a client when the client requires a Static 99 Assessment and Facts of Offense Sheet.	See parent	See parent	Included InOriginal			4
1075	2	1075#2	1075	Adult	AssessmentAndCasePlan		System must allow the user to complete, save, and print Static 99 Assessment for client who requires a Static 99 Assessment.	See parent	See parent	Included InOriginal			6
1075	3	1075#3	1075	Adult	AssessmentAndCasePlan		System must allow the user to complete, save, and print Facts of Offense Sheet for a client who requires a Facts of Offense Sheet.	See parent	See parent	Included InOriginal			6
1075	4	1075#4	1075	Adult	AssessmentAndCasePlan		System must allow the user to record the time needed for the user to complete Static 99 Assessment and Facts of Offense Sheet.	See parent	See parent	Included InOriginal			6
1075	5	1075#5	1075	Adult	AssessmentAndCasePlan		System must allow the user to print only the score, and not the assessment for Static 99 Assessment for a client.	See parent	See parent	Included InOriginal			6
1075	6	1075#6	1075	Adult	AssessmentAndCasePlan		System must allow the user to record disposition information for a client when sentenced by the court.	See parent	See parent	Included InOriginal			3
1075	7	1075#7	1075	Adult	AssessmentAndCasePlan		System must allow the user to record detailed information for State Senate Bill 90 requirements to the state for a client.	See parent	See parent	Included InOriginal			3

1075	8	1075#8	1075	Adult	AssessmentAndCasePlan		System must allow the user to generate a detailed report for State Senate Bill 90.	See parent	See parent	Included InOriginal			6
1075	9	1075#9	1075	Adult	AssessmentAndCasePlan		System must allow user to generate the report for State Senate Bill 90 on a predetermined time interval.	See parent	See parent	Included InOriginal			6
1075	N/A	1075	1075	Adult	AssessmentAndCasePlan	Court Hearing/Court Report Summary	<b>See Supplement: Sex Offense Assessment Tracking</b>	0	Customization - Static 99 is currently used by a another county and Capita implemented Static 99 into Capita Case, It can be extended to be used by San Mateo as well in its current state without any modifications. The FOS sheet can be a word template within the system and if there are any additional data elements that need to be mapped, it will be addressed under Form Templates section. Any reports related to the Static 99 Assessment will be handed under reports section.	Estimate dAsNetNew		0	4
1084	0	1084#0	N/A	Juvenile	Common	Case Notes Summary	Certain actions in need to auto generate a case note.			Pending Estimate			6

Original Hours 636 Revised Estimates 16

Total Customization Hours 704.6  
PM Hours 105  
BA/QA/Architect/DBA 141  
Total Estimated Hours 951

# ATTACHMENT D - CUSTOMIZATIONS - WORK PACKAGE ENHANCEMENT DETAILS

## Work Package 7 - Supervision & Administration

Gap.ID	HLR ID/Sub.ID	Gap.ID#Sub.ID	Refer Parent	Area	Module	Screen	High Level Requirement Description	Capita's Original Estimate (hours)	Capita's comments	Estimation Status	Capita Updated?	Revised Estimates (hours)	SMC Proposed W.Package
293	1	293#1	293	Juvenile	Supervision	Mental Health Information	System must allow user to record if Mental Health evaluation was ordered by court.	8	add "Court Ordered service" as primary service and "Mental Health Evaluation" as referral service. For all referral services entered, generate a case note.	IncludedInOriginal			1
293	2	293#2	293	Juvenile	Supervision		System must allow user to record Mental Health treatment time and duration.	see parent	See parent	IncludedInOriginal			1
676	1	676#1	676	Adult	Supervision		System must allow user to record court imposed financial responsibilities for a client by petition and/or case number.	see parent	a new Financial Information screen will allow to track the court imposed fine type and case number	IncludedInOriginal			7
676	2	676#2	676	Adult	Supervision		System must allow user to search for court imposed financial responsibilities by client, petition and/or case number.	see parent	the new Financial Information screen will be client specific. There will be a financial summary screen that will have the summary of all the fines and fees and associated case numbers.	IncludedInOriginal			7
676	3	676#3	676	Adult	Supervision		System must allow user to record details of the payments made related to court imposed financial responsibilities.	see parent	Payment screens will allow to track the payments of the various court ordered fines and fees	IncludedInOriginal			7
676	4	676#4	676	Adult	Supervision		System must calculate the total amount owed by the client for each case imposed for financial responsibilities by the court.	see parent	The Financial Summary screen shows all the fines and fee amounts.. We can customize to group by cases and add the total for each case.	IncludedInOriginal			7

676	5	676#5	676	Adult	Supervision		System must calculate the total amount paid by the client by case and/or petition related to financial responsibilities as imposed by court.	see parent	The payment summary shows the amounts ordered vs paid. It can be customized to show the total by casees.	IncludedInOriginal			7
676	6	676#6	676	Adult	Supervision		System must calculate the balance amount owed by the client for each case imposed for financial responsibilities by the court.	see parent	The payment summary screen displalys the remaining balance.	IncludedInOriginal			7
676	7	676#7	676	Adult	Supervision		System must make the breakdown of fines, fees, restitution and any other financial obligations available for each client by case and/or petition.	see parent	Financial Information screen will allow to track the fine or fee type and each can be entered and payments tracked separately.	IncludedInOriginal			7
676	8	676#8	676	Adult	Supervision		System must allow user to record restitution when they are owed jointly.	see parent	Need more details as to how to handle this. The new Financial Information screen could possibly be extended to include this functionality	IncludedInOriginal			7
676	9	676#9	676	Adult	Supervision		System must allow user to record restitution when they are owed severally.	see parent	Need more details as to how to handle this. The new Financial Information screen could possibly be extended to include this functionality	IncludedInOriginal			7

676	10	676#10	676	Adult	Supervision		System must allow user to view restitution when they are owed jointly and/or severally.	see parent	Need more details as to how to handle this. The new Financial Information screen could possibly be extended to include this functionality. Capita is currently in the process of developing Financial screens and Payment screens. We are assuming that the same screens can be reused to track the information above except as noted where there could be additional customization. The estimates quoted are for additional customizations.	IncludedInOriginal			7
676	11	676#11	676	Adult	Supervision		System must notify users of any outstanding balance amount when probation is terminated and the client owes financial responsibility.	see parent	The Payment Information screen allows to track the payment status even if the case is closed.	IncludedInOriginal			7
676	12	676#12	676	Adult	Supervision		System must allow user to update fine amount when court ordered or due to adult supervision fee adjustment.	see parent	Need specific rules when the fine amount can be updated.	IncludedInOriginal			7
676	13	676#13	676	Adult	Supervision		System must allow user to update fee amount when court ordered or due to adult supervision fee adjustment.	see parent	Need specific rules when the fine amount can be updated.	IncludedInOriginal			7
676	N/A	676	676	Adult	Supervision	Financial Payment Information	See Supplement: Financial Payment Information	80	See itemized	IncludedInOriginal			7

745	0	745#0	N/A	Juvenile	Supervision	Administrative Sanction Summary	System must display Alternative to Detention as label for the field Administrative Sanction Summary.	n/a	This is the standard name for the administrative sanctions used within Capita CASE. This is the same screen used for adults as well. Need more discussion with SMC related to the actual functionality for alternative detention before the names can be changed. No change at this time.	IncludedInOriginal	Yes		7
758	0	758#0	N/A	Juvenile	Supervision	Community Detention Program Violation Summary	System must display Electronic Monitoring Program as label for the field Community Detention Program.	n/a	Need to discuss with SMC before the label changes are made. Conditions of Probation can be used to track the Electronic Monitoring order. Probation Violation screen can be used to track the electronic monitoring violations. No customization included at this time.	IncludedInOriginal	Yes		7
759	0	759#0	N/A	Juvenile	Supervision	Community Detention Program Violation Summary	Duplicate of ID#758	See parent	See parent	IncludedInOriginal			Closed
760	0	760#0	N/A	Juvenile	Supervision	Community Detention Program Violation Summary	System must allow user to generate SMC0 Electronic Monitoring Program violation form when an entry is recorded in Alternative Detention.	0	SMC0 Electronic Monitoring Program violation form can be entered as a form template and saved within PIMS.	IncludedInOriginal	Yes		6

765	1	765#1	765	Detention	Supervision		System must allow user to record the number of days completed when the client is referred to Community Services.	see parent	will change label from hours to days/hours to complete on the Community Service Case Information screen	IncludedInOriginal			7
765	2	765#2	765	Detention	Supervision		System must allow user to update the status of the client when client is referred to Community Services. a. Waiting List b. Completed c. Current d. Graduated e. Terminated f. Referred g. Suspended	see parent	ADD: Radio Button to indicate if youth is on waiting list and will auto generate a Case Note of the status.	IncludedInOriginal			7
765	3	765#3	765	Detention	Supervision		System must notify users when the Case status changes for the client referred to Community Services.	see parent	add a new workflow to notify the PO of status change.	IncludedInOriginal			7
765	4	765#4	765	Detention	Supervision		System must allow user to record the referral source for each client referred to Community Services.;a. Court Ordered;b. Alternative to Detention	see parent	ADD: A drop down "Referral Source:" containing Alternative to detention (ATD), & Court Ordered	IncludedInOriginal			7
765	5	765#5	765	Detention	Supervision		System must allow user to record who referred the client to Community Services program.	see parent	ADD: A drop Down"Referred By:" and a list of all DPO's	IncludedInOriginal			7
765	6	765#6	765	Detention	Supervision		System must allow user to record Days Completed when client is referred to Community Services.	see parent	Change the labels to: Hours/Days Completed on the Community Service Placement Info screen	IncludedInOriginal			7

765	7	765#7	765	Detention	Supervision		System must allow user to record Days Posted when client is referred to Community Services.	see parent	Change the labels to: Hours/Days Posted on the Community Service Placement Info screen	IncludedInOriginal			7
765	8	765#8	765	Detention	Supervision		System must allow user to update the status (excused, un-excused, failed day, day completed) for the client for Community services.	see parent	ADD:a drop down with the option to select "excused" or "un-excused Absence, Failed Day, Completed Day... Once selected, it will autogenareate a case note and notify DPO of record.	IncludedInOriginal			7
765	9	765#9	765	Detention	Supervision		System must notify users (DPO) when the Client Status changes for the client referred to Community services.	see parent	add a new workflow to notify the PO of status change	IncludedInOriginal			7
765	10	765#10	765	Detention	Supervision		System must allow user to record points for each client.	see parent	ADD: a drop down for points the earned for that day. A drop down from 0-13.	IncludedInOriginal			7
765	11	765#11	765	Detention	Supervision		System must allow user to record penalty point for each client.	see parent	ADD: a drop down for penalty points . A drop down from 0 to minus 13 ADD:Site A, site B, Site C, Site D. Once you select the work site, a Open Field box will be available to put the specific location since it can change by week.	IncludedInOriginal			7
765	N/A	765	765	Detention	Supervision	Community Service Case Summary	See Supplement: Community Care Program	40	See itemized	IncludedInOriginal			7
766	N/A	766	765	Detention	Supervision	Community Service Case Summary	See Supplement: Community Care Program	0	See responses to item 765	IncludedInOriginal			7
767	N/A	767	765	Detention	Supervision	Community Service Case Summary	See Supplement: Community Care Program	0	See responses to item 765	IncludedInOriginal			7



768	N/A	768	765	Detention	Supervision	Community Service Case Summary	See Supplement: Community Care Program	0	See responses to item 765	IncludedInOriginal			7
774	0	774#0	N/A	Juvenile	Supervision	Community Service Site Placement Info	System must display Community Based Organizations as label for the field Community Service Site Placements.	n/a	Screen names are generic for the Capita CASE product. Vendor Placements and Community Placements are a listing of all the clients placed at the sites. No change recommended.	IncludedInOriginal	Yes		7
777	N/A	777	765	Detention	Supervision	Community Service Placement and Hours Applied Summary	See Supplement: Community Care Program	56	See 765#6 to 765#11	IncludedInOriginal			7
778	N/A	778	765	Detention	Supervision	Community Service Placement Info	See Supplement: Community Care Program	0	See responses to item 777 above	IncludedInOriginal			7
779	N/A	779	765	Detention	Supervision	Community Service Placement and Hours Applied Summary	See Supplement: Community Care Program	0	See responses to item 777 above	IncludedInOriginal			7
780	N/A	780	765	Detention	Supervision	Community Service Placement and Hours Applied Summary	See Supplement: Community Care Program	0	See responses to item 777 above	IncludedInOriginal			7
784	1	784#1	784	Adult	Supervision	Contact Information	Users want the ability to document client contacts without having to manually type in their name.	16	Modify the contact screen to do the following: 1. If required contact, default the contact subtype to PO and show a dropdown of client POs (primary and secondary). 2. For all other contacts, the existing functionality will work. Move the contact person to in below contact sub type. User can enter the name of the contact sub type (case worker, teacher, etc) in this field.	IncludedInOriginal			7

787	1	787#1	787	Juvenile	Supervision	Contact Information	System must require user to record Contact Person field.	16	modify the contact screen to do the following: If required contact, default the contact subtype to PO and show a new dropdown of client POs (primary and secondary).	IncludedInOriginal			7
787	2	787#2	787	Juvenile	Supervision		System must allow user to select values Client, Mother, Father, Service Provider, Social Worker, and Other as values for Contact Person.	See parent	modify the contact screen to do the following: For all other contacts, the existing functionality will work. Move the contact person to in below contact sub type. User can enter the name of the contact sub type (case worker, teacher, etc) in this field.	IncludedInOriginal			7
788	0	788#0	N/A	Juvenile	Supervision	Contact Information	Duplicate: See ID 787	See parent		IncludedInOriginal			Closed
789	0	789#0	N/A	Juvenile	Supervision	Contact Information	User requests that a Incident Report be generated automatically should an arrest or search occur (for client's case)	duplicate		PendingConfirmation			6

834	1	834#1	834	Adult	Supervision		Incident takes place (incident = arrests, use of force incidents, searches, field visits, property confiscation, and any other unusual incidents).	see parent	Customization - Items #1 and #2 will be added to the existing Contacts screen based on the mockup provided to Capita. This will be an extension of the existing Contacts screen functionality. Refer to Contacts screen pdf (mock up)	IncludedInOriginal			6
834	2	834#2	834	Adult	Supervision		PO completes the incident report with the following mandatory information: case #, date, start time of incident, end time of incident, contact method, police agencies involved, nature of contact, participating officers, other participants, location, list of contraband seized, number of items seized, and narrative.	see parent	Customization - Items #1 and #2 will be added to the existing Contacts screen based on the mockup provided to Capita. This will be an extension of the existing Contacts screen functionality. Refer to Contacts screen pdf (mock up)	IncludedInOriginal			6
834	3	834#3	834	Adult	Supervision		Report is submitted to the chain of command.	see parent	the report can be entered as a word template and the effort for adding any new data elements for mapping will be included there.	IncludedInOriginal			6
834	N/A	834	834	Adult	Supervision	Contact Information	<b>See Supplement: Adult Incident Report</b>	32	See itemized	IncludedInOriginal			6
841	1	841#1	841	Juvenile	Supervision		System must allow user to record the number of hours completed by the client for a specific type of service.	see parent	primary and referral services screens - current functionality	IncludedInOriginal			7

841	2	841#2	841	Juvenile	Supervision		System must allow user to record the number of sessions completed by the client for a specific type of service.	see parent	primary and referral services screens - current functionality	IncludedInOriginal			7
841	3	841#3	841	Juvenile	Supervision		System must allow user to record the name of the counselor for the client.	see parent	primary and referral services screens - current functionality	IncludedInOriginal			7
841	4	841#4	841	Juvenile	Supervision		System must allow user to record the name and location of the service provider selected for the client.	see parent	vendor services - current functionality	IncludedInOriginal			7
841	5	841#5	841	Juvenile	Supervision		System must allow user to record the number of hours completed by the client as reported by the service provider.	see parent	vendor placements - current functionality	IncludedInOriginal			7
841	6	841#6	841	Juvenile	Supervision		System must allow user to record the number of sessions completed by the client as reported by the service provider.	see parent	vendor placements - current functionality	IncludedInOriginal			7
841	7	841#7	841	Juvenile	Supervision		System must allow user to record the date of counseling, name of the counselor and the location for a client.	see parent	primary and referral services screens, vendor placements - current functionality	IncludedInOriginal			7
841	8	841#8	841	Juvenile	Supervision		System must indicate user when the number of hours reported by the service provider does not match the number of hours reported by the client.	see parent	not tracked. PIMS does not track the hours reported by the client. It can be entered as case notes or as a comment on the vendor placement screen	IncludedInOriginal			7

841	9	841#9	841	Juvenile	Supervision		System must indicate user when the number of sessions reported by the service provider does not match the number of sessions reported by the client.	see parent	not tracked. PIMS does not track the session reported by the client. It can be entered as case notes or as a comment on the vendor placement screen	IncludedInOriginal			7
841	10	841#10	841	Juvenile	Supervision		System must allow user to record service referrals made to the client.	see parent	vendor placements - current functionality	IncludedInOriginal			7
841	11	841#11	841	Juvenile	Supervision		System must allow user to identify if a referral made to the client, and to which agency.	see parent	vendor placements - current functionality	IncludedInOriginal			7
841	12	841#12	841	Juvenile	Supervision		System must allow user to record multiple sources of referrals			EstimatedAsNetNew		16	7
841	N/A	841	841	Juvenile	Supervision	Counseling Information	See Supplement: Service Referrals	40	See itemized	IncludedInOriginal			7
842	N/A	842	841	Juvenile	Supervision	Counseling Information	See Supplement: Service Referrals	see parent	See parent	IncludedInOriginal			7
843	N/A	843	841	Juvenile	Supervision	Counseling Information	See Supplement: Service Referrals	see parent	See parent	IncludedInOriginal			7

844	N/A	844	841	Juvenile	Supervision	Counseling Information	See Supplement: Service Referrals	see parent	See parent	IncludedInOriginal			7
855	N/A	855	841	Juvenile	Supervision	Counseling Information	See Supplement: Service Referrals	see parent	See parent	IncludedInOriginal			7
858	N/A	858	841	Juvenile	Supervision	Counseling Information	See Supplement: Service Referrals	see parent	See parent	IncludedInOriginal			7
859	N/A	859	841	Juvenile	Supervision	Counseling Summary	See Supplement: Service Referrals	see parent	See parent	IncludedInOriginal			7
860	N/A	860	841	Juvenile	Supervision	Counseling Summary	See Supplement: Service Referrals	see parent	See parent	IncludedInOriginal			7

861	N/A	861	841	Juvenile	Supervision	Counseling Summary	See Supplement: Service Referrals	see parent	See parent	IncludedInOrigin al			7
862	N/A	862	841	Juvenile	Supervision	Counseling Summary	See Supplement: Service Referrals	see parent	See parent	IncludedInOrigin al			7
863	N/A	863	841	Juvenile	Supervision	Counseling Summary	See Supplement: Service Referrals	see parent	See parent	IncludedInOrigin al			7
864	N/A	864	841	Juvenile	Supervision	Counseling Summary	See Supplement: Service Referrals	see parent	See parent	IncludedInOrigin al			7
865	N/A	865	841	Juvenile	Supervision	Counseling Summary	See Supplement: Service Referrals	see parent	See parent	IncludedInOrigin al			7

866	N/A	866	841	Juvenile	Supervision	Counseling Summary	See Supplement: Service Referrals	see parent	See parent	IncludedInOriginal			7
867	N/A	867	841	Juvenile	Supervision	Counseling Summary	See Supplement: Service Referrals	see parent	See parent	IncludedInOriginal			7
868	0	868#0	N/A	Adult	Supervision	Counseling Summary	System must allow user to sort the entries based on date of recent activity in ascending and descending order.	0	Will add the sort feature to Counseling Summary screen	IncludedInOriginal			7
870	0	870#0	N/A	Juvenile	Supervision	Criminal History	System must display criminal history grouped by Case.	16	This is too big of a change to the structure of the criminal history screen. If necessary, we can add case number to the summary screen and provide the sort function so the charges can be grouped by case number.	IncludedInOriginal			7
875	N/A	875	676	Juvenile	Supervision	Financial Payment Information	See Supplement: Financial Payment Information	0	See response to item #676 above	IncludedInOriginal			7
878	N/A	878	676	Juvenile	Supervision	Financial Payment Information	See Supplement: Financial Payment Information	0	See response to item #676 above	IncludedInOriginal			7
879	N/A	879	676	Adult	Supervision	Financial Payment Information	See Supplement: Financial Payment Information	0	See response to item #676 above	IncludedInOriginal			7



880	N/A	880	676	Adult	Supervision	Financial Payment Information	See Supplement: Financial Payment Information	0	See response to item #676 above	IncludedInOriginal			7
881	N/A	881	676	Adult	Supervision	Financial Payment Information	See Supplement: Financial Payment Information	0	See response to item #676 above	IncludedInOriginal			7
882	N/A	882	676	Juvenile	Supervision	Financial Payment Information	See Supplement: Financial Payment Information	0	See response to item #676 above	IncludedInOriginal			7
887	0	887#0	N/A	Adult	Supervision	Probation Violation Information	System must allow user to associate multiple charges to a probation violation.	0	this is already fixed. Multiple charges can be added to adult PVNs.	IncludedInOriginal			7
908	0	908#0	N/A	Adult	Supervision	Probation Violation Information	System must not mandate user to enter Client notified by field when recording probation violation.	0	The Field is no longer required in Build 1.64.	IncludedInOriginal			7
909	0	909#0	N/A	Adult	Supervision	Probation Violation Information	System must not mandate user to enter time field when recording probation violation.	0	Will relax the arrest time requirement on the PVN screen	IncludedInOriginal			7
910	0	910#0	N/A	Adult	Supervision	Probation Violation Information	Duplicate. See ID 908	see parent	N/A	IncludedInOriginal			7
928	0	928#0	N/A	Juvenile	Supervision	Required Contact Information	System must allow user to record the Number of Required Contacts for Client/Minor and/or Parent(s)/Legal Guardians.	40	Capture the required contacts with parent and with juvenile separately on the Required Contacts screen by adding a radio button for minor and parent.  Modify the Contacts screen to track against the required minor and parent contacts separately.	IncludedInOriginal			7

930	0	930#0	N/A	Adult	Supervision	Required Contact Information	System must allow user to record freetext comments for in Required Contacts Information screen.	8	Add additional Comments text box to the Required Contacts Information screen.	IncludedInOriginal			7
936	1	936#1	936	Adult	Supervision		System must record date and time client notified of substance abuse test	See Gap.ID 937	current functionality	IncludedInOriginal			7
936	2	936#2	936	Adult	Supervision		System must record location where test was administered	See Gap.ID 937	current functionality	IncludedInOriginal			7
936	3	936#3	936	Adult	Supervision		System must record actual test date and time (Required field)	See Gap.ID 937	the actual test date and time are not currently required because the same screen is used for scheduling a test date and for tracking the actual test date. At the time of scheduling the test date, the actual test date may not be known. Cannot support the functionality.	IncludedInOriginal	Yes		7
936	4	936#4	936	Adult	Supervision		System must record the type of test conducted (random or scheduled)	See Gap.ID 937	will add additional field to track the type of test	IncludedInOriginal			7
936	5	936#5	936	Adult	Supervision		System must record type of sample obtained (breath or urine)	See Gap.ID 937	urrent functionality	IncludedInOriginal			7
936	6	936#6	936	Adult	Supervision		System must record who administered the test (GS or PO name)	See Gap.ID 937	Collected by is tracked on the existing screens, this is a finder with the name of all the staff - current functionality	IncludedInOriginal			7

936	7	936#7	936	Adult	Supervision		System must record presumptive test results (positive or negative) - required field	See Gap.ID 937	required field - add 'Presumptive Results' dropdown with values of positive, negative, inconclusive. Add the field above the "Lab Test Results" section	IncludedInOriginal			7
936	8	936#8	936	Adult	Supervision		User should be able to record what substances sample was presumptive positive for	See Gap.ID 937	will add Positive Substances, multi-select dropdown, similar to lab test results section	IncludedInOriginal			7
936	9	936#9	936	Adult	Supervision		System must record if client admits or denies substance use (required field)	See Gap.ID 937	current functionality, but cannot be made required because this information may not be known at the time of entering the initial record.	IncludedInOriginal			7
936	10	936#10	936	Adult	Supervision		System should report out all tests conducted on client	See Gap.ID 937	current functionality	IncludedInOriginal			7
936	11	936#11	936	Adult	Supervision		System should record if sample was sent to lab for testing	See Gap.ID 937	current functionality	IncludedInOriginal			7
936	12	936#12	936	Adult	Supervision		System should require Lab test # if sample is sent to lab	See Gap.ID 937	It can be added to the comments.	IncludedInOriginal			7
936	13	936#13	936	Adult	Supervision		System should record pertinent information from the outsourced lab (such as personnel who tested sample, the date sample was tested, type of sample tested, test results (+/-), and what type of substances were detected and levels)	See Gap.ID 937	all of this is tracked under Lab Test Results section in the current Substance Abuse screen. Name of the lab personnel who tested the sample can be entered in comments. - no change	IncludedInOriginal			7

936	14	936#14	936	Adult	Supervision		System should allow for comments to be entered by user and outsourced lab	See Gap.ID 937	Comments section already exists under the Lab Test Results section. Will add another Comments field to the Presumptive Results section.	IncludedInOriginal			7
936	N/A	936	936	Adult	Supervision	Substance Abuse Information	See Supplement: Substance Abuse	See Gap.ID 937	no corresponding requirement id in the supplemental document	IncludedInOriginal			7
937	N/A	937	936	Juvenile	Supervision	Substance Abuse Information	See Supplement: Substance Abuse	40	See 936	IncludedInOriginal			7
943	N/A	943	936	Juvenile	Supervision	Substance abuse information	See Supplement: Substance Abuse	see parent	See responses to item #937 above	IncludedInOriginal			7
945	N/A	945	936	Juvenile	Supervision	Substance Abuse Information	See Supplement: Substance Abuse	see parent	See responses to item #937 above	IncludedInOriginal			7
946	N/A	946	936	Juvenile	Supervision	Substance Abuse Information	See Supplement: Substance Abuse	see parent	See responses to item #937 above	IncludedInOriginal			7
952	0	952#0	N/A	Juvenile	Supervision	Vendor Placements Summary	System must display options for Counselling Services and Actual Residential Programs as separate lists and/or organized by type.	8	Will add vendor sub type to the Vendor Placement Summary screen	IncludedInOriginal			7

965	0	965#0	N/A	Juvenile	Supervision	Administrative Sanction Summary	System must display Alternative to Detention as label for the field Administrative Sanction Summary.	n/a	This is the standard name for the administrative sanctions used within Capita CASE. This is the same screen used for adults as well. Need more discussion with SMC related to the actual functionality for alternative detention before the names can be changed. No change at this time.	IncludedInOriginal	Yes		7
968	0	968#0	N/A	Juvenile	Supervision	Community Detention Program Violation Summary	System must display Court Case Number as label for the field Case no.	0	Will change the label from "Case No." to "Court Case Number"	IncludedInOriginal			7
970	0	970#0	N/A	Juvenile	Supervision	Community Detention Program Violation Summary	System must display Electronic Program Monitoring as label for the field Community Detention Program Violation Summary.	n/a	Need to discuss with SMC before the label changes are made. Conditions of Probation can be used to track the Electronic Monitoring order. Probation Violation screen can be used to track the electronic monitoring violations. No customization included at this time.	IncludedInOriginal	Yes		7
976	N/A	976	676	Juvenile	Supervision	Financial Payment Summary	See Supplement: Financial Payment Information	0	See response to item #676 above	IncludedInOriginal			7
1001	N/A	1001	676	Juvenile	Supervision	Financial Payment Summary	See Supplement: Financial Payment Information	0	See response to item #676 above	IncludedInOriginal			7

1003	1	1003#1	1003	Juvenile	Supervision		System must allow user to record one or more parent and/or guardian as client for Parent Project program.	see parent	N/A	IncludedInOriginal			7
1003	2	1003#2	1003	Juvenile	Supervision		System must allow user to record one or more parent and/or guardian as client for Staying Connected program.	see parent	o Add the minor first as a special admission (even though the services are for the parents) o Add the mother, father, etc. as interested parties or family o Set up the primary service for Parenting on the Services screen o Add corresponding referral services (Parent Project, Staying Connected) for the primary service of Parenting o This is existing functionality	IncludedInOriginal			7
1003	3	1003#3	1003	Juvenile	Supervision		System must allow user to record referral information of parents and/or guardians who will participate in Parent Project program.	see parent	N/A	IncludedInOriginal			7
1003	4	1003#4	1003	Juvenile	Supervision		System must allow user to record referral information of parents and/or guardians who will participate in Staying Connected program.	see parent	Add the mother, father, etc. as interested parties or family - current functionality	IncludedInOriginal			7
1003	5	1003#5	1003	Juvenile	Supervision		System must identify parents and guardians as clients for Parent Project program.	see parent	N/A	IncludedInOriginal			7

1003	6	1003#6	1003	Juvenile	Supervision		System must identify parents and guardians as client for Staying Connected program.	see parent	o Modify the existing referral services to include a dropdown of the family members. Show the relationship concatenated with the name (similar to Household summary dropdown). The dropdown will only display when the referral service is Parent Project or Staying Connected.	IncludedInOriginal			7
1003	7	1003#7	1003	Juvenile	Supervision		System must allow user to record when Parent Project program is ordered by court or not.	see parent	N/A	IncludedInOriginal			7
1003	8	1003#8	1003	Juvenile	Supervision		System must allow user to record when Staying Connected program is ordered by court or not.	see parent	Use the Court Ordered check box on the referral service screen - current functionality	IncludedInOriginal			7
1003	9	1003#9	1003	Juvenile	Supervision		System must allow user to record the attendance of the client in Parent Project program.	see parent	N/A	IncludedInOriginal			7
1003	10	1003#10	1003	Juvenile	Supervision		System must allow user to record the attendance of the client in Staying connected program.	see parent	Modify the existing Vendor Placement screens to show the parents name if the service is Parent Project or Staying Connected. This will allow for tracking the progress of the parents/guardian on the two projects.	IncludedInOriginal			7

1003	11	1003#11	1003	Juvenile	Supervision		System must allow user to record the client's completion of Parent Project program.	see parent	N/A	IncludedInOriginal			7
1003	12	1003#12	1003	Juvenile	Supervision		System must allow user to record the client's completion of Staying Connected program.	see parent	Use the Service Status on the Referral Information screen to track the status of the programs	IncludedInOriginal			7
1003	13	1003#13	1003	Juvenile	Supervision		System must allow user to record when the client fails to comply to participate in Parent Project Program.	see parent	N/A	IncludedInOriginal			7
1003	14	1003#14	1003	Juvenile	Supervision		System must allow user to record when the client fails to comply to participate in Staying Connected program.	see parent	Use the Service Status on the Referral Information screen to track the status of the programs including failure to comply	IncludedInOriginal			7
1003	15	1003#15	1003	Juvenile	Supervision		System must allow user to record if one or both parents are required to participate in the Parent Project program.	see parent	N/A	IncludedInOriginal			7
1003	16	1003#16	1003	Juvenile	Supervision		System must allow user to record if one or both parents are required to participate in the Staying Connected program.	see parent	o Can be tracked on the Referral Services screen. See response to #1003 above.	IncludedInOriginal			7
1003	17	1003#17	1003	Juvenile	Supervision		System must allow user to record the number of hours and/or sessions ordered for each client (parent).	see parent	o Tracked on the Referral Services screen - current functionality	IncludedInOriginal			7



1003	18	1003#18	1003	Juvenile	Supervision		System must allow user to record the number of hours and/or sessions completed by each client (parent).	see parent	o Tracked on the Vendor Placement Information screen - current functionality	IncludedInOriginal			7
1003	19	1003#19	1003	Juvenile	Supervision		System must allow user to identify a client (parent) participating in Parent Project program to not be associated to any juvenile client.	see parent	#19 and #20 will require quite a bit of customization and is not recommended. Also, it will be tough to track if the juvenile later becomes a client in the system. If the juvenile name is not known, SMC can enter a dummy name and assoicate the parents to the client. PIMS is client-centric and cannot be modified to make it parent-centric	IncludedInOriginal			7
1003	20	1003#20	1003	Juvenile	Supervision		System must allow user to identify a client (parent) participating in Staying Connected program to not be associated to any juvenile client.	see parent	N/A	IncludedInOriginal			2
1003	21	1003#21	1003	Juvenile	Supervision		System must allow user to record the status of the client participating in Parent Project program.	see parent	N/A	IncludedInOriginal			7
1003	22	1003#22	1003	Juvenile	Supervision		System must allow user to record the status of client participating in Staying Connected program.	see parent	Use the Service Status on the Referral Information screen to track the status of the programs for the parents in both the programs	IncludedInOriginal			7

1003	23	1003#23	1003	Juvenile	Supervision		System must allow user to record the status of the client participating in Proud Parenting program.	see parent	Use the Service Status on the Referral Information screen to track the status of the program for the client	IncludedInOriginal			7
1003	24	1003#24	1003	Juvenile	Supervision		System must notify user about the status of the client participating in the program when the client is referred to the program by Probation Officer	see parent	Workflows can be added to trigger the notification process of the participant status if the program was referred by the P.O. SMC to provide the specifics of the workflow	IncludedInOriginal			7
1003	25	1003#25	1003	Juvenile	Supervision		System must notify user about "potential match" when the user is creating a new client and a match already exists in the System.	see parent	A new feature has been added where anytime an interested party or family is added to the system that the system forces the user to search from the existing list before creating a new one. The same feature can be used to find the potential match when adding the family.	IncludedInOriginal			2
1003	26	1003#26	1003	Juvenile	Supervision		System must allow user to select from the list of potential matches to use as current client.	see parent	o See response to #25 above. For the Parent Project program and Staying Connected, it is our assumption that the client will still be the juvenile. See response to items 19 and 20 above for #1008 above	IncludedInOriginal			2
1003	27	1003#27	1003	Juvenile	Supervision		System must allow user to not select from the list of potential matches to use as current client, and create a new client record.	see parent	o See bullet #25 above	IncludedInOriginal			2

1003	28	1003#28	1003	Juvenile	Supervision		System must allow user to associate a parent/legal guardian to a minor when the parent/legal guardian is the participant in a program.	see parent	o Use Family/Interested Parties tab - existing functionality	IncludedInOriginal			1
1003	29	1003#29	1003	Juvenile	Supervision		System must allow user to associate a minor to a parent/legal guardian when the minor is the participant in a program.	see parent	o Use Family/Interested Parties tab - existing functionality	IncludedInOriginal			1
1003	30	1003#30	1003	Juvenile	Supervision		System must allow a parent/legal guardian to participate in a program without being associated to a minor.	see parent	o See response to items 19 and 20 above for #1008 above	IncludedInOriginal			7
1003	31	1003#31	1003	Juvenile	Supervision		System must allow user to record the attendance of the client when the client is participant in a program.	see parent	N/A	IncludedInOriginal			7
1003	32	1003#32	1003	Juvenile	Supervision		System must allow user to track the attendance of the client when the client is a participant in a program.	see parent	o Use the existing Vendor Services screen to record/track the attendance of the parent or the juvenile	IncludedInOriginal			7
1003	33	1003#33	1003	Juvenile	Supervision		System must automatically pre-populate existing information from Client Information screen to Special Admission screen when the client exists in the System.	see parent	o Will modify the existing functionality to pre-populate the existing information on to the Special Admission screen. This will be done from the search screen when entering the client for the first time or when entering a special admission for an existing client.	IncludedInOriginal			2

1003	34	1003#34	1003	Juvenile	Supervision		System must automatically pre-populate existing information from Client Information screen to "Family" section/tab in Client Information screen when the client exists in the System.	see parent	o Not clear on the requirement. If the client exists in the system and there is already existing family information, it will be visible to the user. They won't need to re-enter the information. No customization is provided since the requirement is not clear.	IncludedInOriginal			1
1003	35	1003#35	1003	Juvenile	Supervision		System must automatically pre-populate existing information for a minor client in "Family" section/tab when the parent(s)/legal guardian(s) exist in the System.	see parent	Requirement not clear. In this context, minor will always exist as a client and family information can be entered for the minor on the Client Info/Family tab. If the client already has family info entered previously, this information will be visible on the Family tab.	IncludedInOriginal			1

1003	36	1003#36	1003	Juvenile	Supervision		System must allow user to select from a potential list of clients before the user creates a new client profile.	see parent	o User is always forced to search for a client before creating a new client using the Intake or Special Admission screens. In addition to the above changes, all the Supervision screens where the case number is displayed, will now show the case number entered on the Special Admission screen (in addition to the case number from the Case module)	IncludedInOriginal			2
1003	N/A	1003	1003	Juvenile	Supervision	Referral Service Information	See Supplement: Parenting Program	56	See itemized	IncludedInOriginal			2
1008	N/A	1008	1003	Juvenile	Supervision	Vendor Placements Summary	See Supplement: Parenting Program	24	See 1003#15 to 1003#24	IncludedInOriginal			2
1009	N/A	1009	1003	Juvenile	Supervision	Vendor Placements Summary	See Supplement: Parenting Program	80	See 1003#25 to 1003#36	IncludedInOriginal			2
1023	1	1023#1	1023	Detention	Supervision		System must allow user to record all instances phone contact made with the client when the client is on Home Pass.	see parent	use the existing Contacts screen and add a contact Type of Home Pass and use the Contact Method of Phone to track the information.	IncludedInOriginal			7
1023	2	1023#2	1023	Detention	Supervision		System must allow user to record the number dialed and the date and time of the phone contact made to the client on Home Pass.	see parent	dialed number can be entered in comments area. Date and Time are already tracked.	IncludedInOriginal			7

1023	3	1023#3	1023	Detention	Supervision		System must allow user to record notes for each phone contact made to the client on Home Pass.	see parent	use the comments field to enter notes.	IncludedInOriginal			7
1023	4	1023#4	1023	Detention	Supervision		System must allow user to record the date and time the user will have to contact the client again who is on Home Pass.	see parent	this can be entered into the comments section or add a new field(s) to track the date and time of the next phone call.	IncludedInOriginal			7
1023	5	1023#5	1023	Detention	Supervision		System must allow user to record if the phone contact was answered by the client, or if the user left a voice message, or there was no answer when the user made a phone contact to the client on Home Pass.	see parent	this can be tracked in the status field and additional comments can be entered in the comments field.	IncludedInOriginal			7
1023	6	1023#6	1023	Detention	Supervision		System must allow user to generate report of all details phone contacts and including notes.	see parent	this will be handled as part of the reports development.	IncludedInOriginal			6
1023	7	1023#7	1023	Detention	Supervision		System must allow user to record all phone contact made by the client when in custody.	see parent	add a contact Type of In Custody and use the Contact Method of Phone to track the information.	IncludedInOriginal			7
1023	8	1023#8	1023	Detention	Supervision		System must allow user to record the type of phone contact that was made by the client when in custody.	see parent	current functionality	IncludedInOriginal			7

1023	9	1023#9	1023	Detention	Supervision		System must allow user to record the details of the phone contact made by the client when in custody including call type, call recipient, phone number, date and time, and if the call was completed.	see parent	can be tracked similar to Home Pass calls	IncludedInOriginal			7
1023	10	1023#10	1023	Detention	Supervision		System must allow user to generate report of phone call log.	see parent	this will be handled as part of the reports development.	IncludedInOriginal			6
1023	11	1023#11	1023	Detention	Supervision		System must allow user to print Phone Call Log Report.	see parent	this will be handled as part of the reports development.	IncludedInOriginal			6
1023	N/A	1023	1023	Detention	Supervision	Contact Information	See Supplement: Phone Log	16	See itemized	IncludedInOriginal			6
1052	1	1052#1	1052	Detention	Supervision		System must allow user to record all external programs available for the client in custody.	see parent	as long as the client is in the system (either through regular intake process or special admission process), programs screen can be used. Programs can be added to the corresponding reference codes.	IncludedInOriginal			7
1052	2	1052#2	1052	Detention	Supervision		System must allow user to record the external programs the client in custody is enrolled in.	see parent	use the existing services and referral services screens to track this information, current functionality	IncludedInOriginal			7

1052	3	1052#3	1052	Detention	Supervision		System must allow user to record the days and hours the client in custody has attended an external program.	see parent	can be tracked on the vendor placement information which tracks the hours and dates of completion, current functionality	IncludedInOriginal			7
1052	4	1052#4	1052	Detention	Supervision		System must allow user to record an enrolled external program for multiple clients at the same time.	see parent	Vendor Placement Summary screen shows the list of all the current enrollments at the site, current functionality	IncludedInOriginal			7
1052	5	1052#5	1052	Detention	Supervision		System must allow user to record the days and hours for an enrolled external program for multiple clients at the same time.	n/a	Vendor Placement Summary screen has all the clients enrolled with the particular service provider. User can click on the edit for each of the clients and add the days and hours. The detail updates are for each client and cannot be done for multiple clients. Given the screen layouts and information tracked on the Vendor Placement Info screen, we cannot support the mass entry of the hours/days.	IncludedInOriginal	Yes		7
1052	6	1052#6	1052	Detention	Supervision		System must allow user to record if a external program is court-ordered for the client in custody.	see parent	Use the Court Ordered check box on the referral service screen - current functionality	IncludedInOriginal			7
1052	7	1052#7	1052	Detention	Supervision		System must allow user to record and track the service provider(s) for each external program.	see parent	Referral services screen - current functionality	IncludedInOriginal			7



1052	8	1052#8	1052	Detention	Supervision		System must allow user to record the check-in time of the service provider visiting the client to provide service.	see parent	Vendor Placement Info screen can be updated to include the check in time along with the date completed, but this is a generic screen for tracking all vendors and may not be applicable to lot of the other services. Or, the check in time could be added to comments. See response to #9 below. Need further discussion.	IncludedInOriginal			7
1052	9	1052#9	1052	Detention	Supervision		System must allow user to record notes and comments for each visit by the service provider.	see parent	Vendor Placement Info screen can be modified to include comments for each record within the Vendor Service Hours/Sessions sub table.	IncludedInOriginal			7
1052	10	1052#10	1052	Detention	Supervision		System must allow user to generate monthly report for each external program with the days, hours and number of service providers.	see parent	this will be handled as part of the reports development.	IncludedInOriginal			6
1052	11	1052#11	1052	Detention	Supervision		System must allow user to record and track the internal program every day for clients in custody.	see parent	referral services LOV need to be modified to track each of the programs as either internal or external, so they can be tracked accordingly	IncludedInOriginal			7
1052	12	1052#12	1052	Detention	Supervision		System must allow user to record the internal program the attended by the client in custody.	see parent	use the same Vendor Placement sceens to track the internal or external programs - current functionality	IncludedInOriginal			7

1052	13	1052#13	1052	Detention	Supervision		System must allow user to record the number of hours the client in custody attended the internal program.	see parent	can be tracked on the vendor placement information which tracks the hours and dates of completion, current functionality	IncludedInOriginal			7
1052	14	1052#14	1052	Detention	Supervision		System must allow user to record the internal program attended by the client for multiple clients at the same time.	see parent	see response to item #4 above	IncludedInOriginal			7
1052	15	1052#15	1052	Detention	Supervision		System must allow user to record the number of hours attended by client in an internal program for multiple clients at the same time.	see parent	see response to item #5 above	IncludedInOriginal			7
1052	16	1052#16	1052	Detention	Supervision		System must allow user to record if a client in custody refused to attend an internal program.	see parent	can be tracked as status on the referral service screen. This will track the status for the entire program not each time they attended the program.	IncludedInOriginal			7
1052	17	1052#17	1052	Detention	Supervision		System must allow user to record comments and/or notes for each internal program for each client.	see parent	see response to item #9 above.	IncludedInOriginal			7
1052	18	1052#18	1052	Detention	Supervision		System must allow user to generate a report for each client on the internal programs attended with the dates and hours.	see parent	this will be handled as part of the reports development.	IncludedInOriginal			6
1052	19	1052#19	1052	Detention	Supervision		System must allow user to generate a report for each internal program on the attendance by date range.	see parent	this will be handled as part of the reports development.	IncludedInOriginal			6

1052	20	1052#20	1052	Detention	Supervision		System must allow user to generate a report for each internal program on attendance sorted by dates included in the date range.	see parent	this will be handled as part of the reports development.	IncludedInOriginal			6
1052	N/A	1052	1052	Detention	Supervision	Vendor Placement Info	See Supplement: Programs	24	See itemized	IncludedInOriginal			7
1072	N/A	1072	841	Juvenile	Supervision		See Supplement: Service Referrals	See 841#12	See 841#12	PendingConfirmation			7
1079	1	1079#1	1079	Adult	Supervision	Probation Violation Information	System must allow the user to record specific behaviors of the client when an officer wishes to track positive and negative behavior for a client.	See parent	See parent	IncludedInOriginal			7
1079	2	1079#2	1079	Adult	Supervision	Probation Violation Information	System must allow the user to record the officer's response for the client's behavior when the officer wishes to track positive and negative behavior for a client.	See parent	See parent	IncludedInOriginal			7
1079	3	1079#3	1079	Adult	Supervision	Probation Violation Information	System must allow the user to capture the type of behavior exhibited by the client when an officer wishes to track positive and negative behavior for a client.	See parent	See parent	IncludedInOriginal			7
1079	4	1079#4	1079	Adult	Supervision	Probation Violation Information	System must allow user to review and print the graduated response grid for a client.	See parent	See parent	IncludedInOriginal			7

1079	N/A	1079	1079	Adult	Supervision	Probation Violation Information	See Supplement: Graduated Response Grid	80	Customization - New summary and detail screens will be added to track the client behavior and officer's response. Need more specifics on the list of the positive and negative behaviors and the officer responses.	PendingConfirmation			7
1082	0	1082#0	N/A	Juvenile	Supervision	Service Summary	System must allow user to record and track the details for family members of a client who are served by Probation Programs.	duplicate. See parenting program		IncludedInOriginal			7
1083	1	1083#1	1083	Juvenile	Supervision		System must allow the user to access JJCPA Survey Screen for a client.	see parent	Customization - create a new JJCPA Survey Screen that will have a combination of pre-populated and user entered fields.	IncludedInOriginal			7
1083	2	1083#2	1083	Juvenile	Supervision		System must automatically pre-populate previously answered and/or known information for a case and/or client when the user chooses to record information for survey questions for a client associated with JJCPA.	see parent	see #1 above	IncludedInOriginal			7
1083	3	1083#3	1083	Juvenile	Supervision		System must mandate user to record information for the mandatory questions in the survey for a client who is associated with JJCPA.	see parent	Identify the mandatory fields on the new screen. Will add specific business rules regarding transfer of the case.	IncludedInOriginal			7

1083	4	1083#4	1083	Juvenile	Supervision		System must allow the user to change incorrect pre-populated information in the survey at the source screen from where the data originated for a client who is associated with JJCPA.	see parent	system populated fields will be flagged as read only. User will need to change the source data.	IncludedInOriginal			7
1083	5	1083#5	1083	Juvenile	Supervision		System must not allow user to change pre-populated information in the survey at the JJCPA survey screen for a client who is associated with JJCPA.	see parent	see response to #4 above	IncludedInOriginal			7
1083	6	1083#6	1083	Juvenile	Supervision		System must automatically update pre-populated information in the JJCPA survey screen when the user changes any/all information at the source screen from where the data originated for a client who is associated with JJCPA.	see parent	yes	IncludedInOriginal			7
1083	7	1083#7	1083	Juvenile	Supervision		System must allow the user to record data/information for the survey questions that do not have pre-populated information for a client who is associated with JJCPA.	see parent	there will be user entered fields where the data can be entered.	IncludedInOriginal			7

1083	8	1083#8	1083	Juvenile	Supervision		System must allow the user to record "unknown" or "not applicable" or similar phrase for all questions when it cannot be answered and/or not able to retrieve information at that point in the JJCPA survey for a client who is associated with JJCPA	see parent	will add the restrictions	IncludedInOriginal			7
1083	9	1083#9	1083	Juvenile	Supervision		System must allow the user to record information, and complete JJCPA survey for a client is associated with JJCPA.	see parent	will need specific information from SMC as to how to tie in a client to JJCPA. Might need some minor modifications to the case screens	PendingConfirmation			7
1083	10	1083#10	1083	Juvenile	Supervision		System must allow the user to submit a completed JJCPA survey for a client who is associated with JJCPA.	see parent	will add some conditions to submit the survey and once submitted, it will be read only.	IncludedInOriginal			7
1083	11	1083#11	1083	Juvenile	Supervision		System must allow the user to save information in a JJCPA survey without completing the survey for a client who is associated with JJCPA.	see parent	yes	IncludedInOriginal			7
1083	12	1083#12	1083	Juvenile	Supervision		System must allow the user to return and continue recording information in a JJCPA survey that was previously saved for a client is associated with JJCPA.	see parent	will be able to update JJCPA survey until the time of final submission.	IncludedInOriginal			7

1083	13	1083#13	1083	Juvenile	Supervision		System must not allow the user to change any information for the JJCPA survey questions after the survey has been submitted for a client who is associated with JJCPA.	see parent	yes	IncludedInOriginal			7
1083	14	1083#14	1083	Juvenile	Supervision		System must automatically update the status of JJCPA survey for a client for the different phases of the lifecycle of the survey.	see parent	need more specifics	PendingConfirmation			7
1083	15	1083#15	1083	Juvenile	Supervision		System must allow the user to send the submitted JJCPA survey back to the author for revision/edits for a client.	see parent	will need to establish additional rules and criteria for updates	PendingConfirmation			7
1083	16	1083#16	1083	Juvenile	Supervision		System must maintain a traceable log for the change in status for the JJCPA survey for a client.	see parent	add status to the various states of the survey	IncludedInOriginal			7
1083	17	1083#17	1083	Juvenile	Supervision		System must allow the user to update and resubmit a JJCPA survey for a client when it is returned for revision back to the author.	see parent	need to know the exact specifics for re-submittal	PendingConfirmation			7
1083	18	1083#18	1083	Juvenile	Supervision		System must maintain a traceable log for the information changed in a JJCPA survey for client when it is updated in the revised version.	see parent	can maintain revisions after submitted by the author.	IncludedInOriginal			7

1083	19	1083#19	1083	Juvenile	Supervision		System must not allow a resubmitted JJCPA survey for a client to be sent back to the author again for revisions; a resubmitted JJCPA survey will be considered as the final submitted document.	see parent	ok	IncludedInOriginal			7
1083	20	1083#20	1083	Juvenile	Supervision		System must allow the user to record one JJCPA survey for each program attended by the client.	see parent	will add the restriction	IncludedInOriginal			7
1083	21	1083#21	1083	Juvenile	Supervision		System must allow the user to record more than one JJCPA survey for a client at the same time and limiting one survey for each program.	see parent	need to tie in the program to JJCPA survey	PendingConfirmation			7
1083	22	1083#22	1083	Juvenile	Supervision		System must allow the user to record a JJCPA survey for a client for a program that already has the previous JJCPA survey when the entry date for the program is past 180 days.	see parent	new workflow	IncludedInOriginal			7
1083	23	1083#23	1083	Juvenile	Supervision		System must handle the 180-Day JJCPA survey with the same conditions that is applicable for the initial JJCPA survey.	see parent	will add the conditions to the JJCPA survey screen	IncludedInOriginal			7
1083	24	1083#24	1083	Juvenile	Supervision		System must allow the user to extract/export JJCPA survey information/data in an editable format.	see parent	will need to add the ability to export data from the screen to a standard file format	IncludedInOriginal			7



1083	25	1083#25	1083	Juvenile	Supervision		System must allow the user to generate a report for JJCPA survey information/data.	see parent	this will be part of reports customization	IncludedInOriginal			6
1083	26	1083#26	1083	Juvenile	Supervision		System must notify user when a client is eligible for 180-Day JJCPA survey.	see parent	new workflow	IncludedInOriginal			7
1083	27	1083#27	1083	Juvenile	Supervision		System must notify user to complete 180-Day JJCPA survey when a client terminates a program either due to failure or completion, and not considering the 180 day criteria.	see parent	new workflow	IncludedInOriginal			7
1083	28	1083#28	1083	Juvenile	Supervision		System must notify user to complete and submit 180-Day JJCPA survey for a client when the survey is not submitted by a predetermined number of days after 180 days has passed.	see parent	new workflow	IncludedInOriginal			7
1083	29	1083#29	1083	Juvenile	Supervision		System must notify user when the user is not submitted the 180-Day JJCPA survey for a client after a predetermined number of days after 180 days has passed.	see parent	new workflow	IncludedInOriginal			7
1083	30	1083#30	1083	Juvenile	Supervision		System must allow the user to generate report for JJCPA survey data/information for all complete and incomplete surveys.	see parent	this will be part of reports customization	IncludedInOriginal			6

1083	31	1083#31	1083	Juvenile	Supervision		System must allow user with limited access rights to record, update, and/or save JJCPA survey information for which the user is responsible.	see parent	normally this is controlled through screen access. Looks like there might have to be some additional field level security.	IncludedInOriginal			7
1083	32	1083#32	1083	Juvenile	Supervision		System must automatically repopulate information for JJCPA survey for users with limited access rights.	see parent	need more specifics	PendingConfirmation			7
1083	33	1083#33	1083	Juvenile	Supervision		System must allow users with limited access rights to create a non-probation client in the system.	see parent	use existing special admission screen to enter the client	IncludedInOriginal			7
1083	34	1083#34	1083	Juvenile	Supervision		System must notify user when there is a discrepancy in the JJCPA survey information answered by a user with limited access rights.	see parent	new workflow	IncludedInOriginal			7
1083	N/A	1083	1083	Juvenile	Supervision		See Supplement: JJCPA	160	See itemized	IncludedInOriginal			7

Original Hours	840	Revised Estimates	16
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Total Customization Hours	918.8
PM Hours	137
BA/QA/Architect/DBA	183
Total Estimated Hours	1240

## ATTACHMENT E - ENHANCEMENT DETAILS INTERFACES

Interfaces		Originally Contracted Interfaces	Original Contract		New Enhancement		Assumptions/Notes
No.	Interface	New Enhancement interfaces	Hours	Rate & Amount	Hours: T&M	Rate & Amount	
		Type		110		125	
1	DMV Direct	One-way to DMV - batch	160	17600	fixed		The document says it is a one-way to DMV but the trigger points indicate there could something coming back from DMV if the record is removed. For estimates, we are assuming one-way. Updates from OffenderLink will only include data that already exists in PIMS.
2	OffenderLink	Two-way - batch	315	34650	fixed		
3	Social Solutions - ETO	One-way to Social Solutions - batch				120	
4	CopLink	One way to CopLink - Batch				120	
5	SmartJustice	One way to SmartJustice				220	can also be interfaced via CopLink but the data elements sent to CopLink are fewer
6	JB	Two-way - batch					Not sure what the incoming interface involves? Is it Placement related data that needs to be sent? For all the Title IVE eligiblie minors? Or the POs caseload? Is this only juvenile? Not sure what the incoming interface encompasses? Not including the estimate for this interface.
7	DOJ-JCPSS	One way to JCPSS	160	17600	fixed		
8	Columbia - CUBS	One way to CUBS	315	34650	fixed		Original assumption was this is a one-way interface. Is it going to be two-way? If so, the original estimates will need to be revised to process the incoming data exchange.
9	CeAssessments	Two-way - web service	480	52800	T&M		
10	CJI	one-way interface - 6 exchanges	480	52800	T&M		Assumption is this is a one-way interface to PIMS for calendaring, release logs, ROR Intake Interview, UJC Referral, Probation Activity Report, Notification of Arrest Original assumption was this is a one-way interface. Is it going to be two-way? If so, the original estimates will need to be revised to process the incoming data exchange.
11	Redwood Toxicology	one-way incoming interface	160	17600	fixed		not needed per the specs
12	Parent Education (JCPFS)						
13	CLETS	one-way to CLETS	200	22000	fixed		adding OKTA integration to existing AD architecture not needed per the specs incorporate barcode features within PIMS for bed checks and recording movements . Does not include the hardware costs
14	OKTA					120	
15	BI.com					120	
16	Barcode						
		Total hours + Amounts	2270	249700		700	87500
				74.05%			
		Combined totals hours	2970				
		Combined totals dollars	337200				
General Assumptions:							1. All the interfaces are estimated based on the fact that the existing data plus whatever additional data elements added as part of application customizations will be used for data exchanges. Any other incoming data elements that don't exist within PIMS will not be stored or will be written to case notes.

ATTACHMENT E - ENHANCEMENT DETAILS  
MIGRATIONS

Originally Contracted Migraton services	New Migration services	All work is Time & Material services
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Migrations

Description	Original Contract Hours	Original Contract Rate & Amount	New Enhancment Hours	New Enhancment Rate & Amount
		\$110		\$125
1 Migration of documents (not in the original contract)			200	25,000
2 Assisting SMC with mapping of source system			640	80,000
3 Original migration estimate	1,100	121,000		
Totals	1,100	121,000	840	105,000
Total combined hours	1,940			
Total Combined Dollars	226,000			

Assumptions:

1. Original estimate for migrations was estimated at \$121,000 and it was set as T&M. This was a low estimate with the assumption that SMC would be doing the loading to the staging tables and Capita will be involved only with the migration from staging to transaction tables. New migration activities include: help migrating documents, and help mapping the source systems to PIMS database.