



APPELLATE CASE MANAGEMENT SYSTEM (CMS)
QUESTIONS AND RESPONSES
Posted January 29, 2018



Questions received 1/24/2018

QUESTION	RESPONSE
<i>Pricing Tables</i>	
<p>Will you be providing an Excel worksheet for vendors to submit our cost proposals? Or, do you want vendors to create our own based on the tables provided in the RFP?</p>	<p>An Excel worksheet will not be provided. Vendor may create their own pricing worksheets based upon the tables provided within the RFP.</p> <p>Pricing must include (A) hourly rates, (B) a fixed price for Phase 1 and (C) pricing proposal(s) which include each element identified in Phase III (\$0 cost is an acceptable response to a specific element). Examples of elements include Maintenance costs for Year 3, Support costs for Year 1, etc. and are identified on Page 18 of the RFP.</p>

Addendum A

<p>1.2.4.2 <i>Provide the ability for an authorized user to void cases.</i></p>	<p>Could you please provide the definition of “void a case” with reference to this requirement?</p>	<p>“Void a Case” refers to making a case record in a state as if it had not existed while leaving a record that it was created. An example of a situation in which this could occur: An agency at two different points in time sends over the same record initiating a Court of Appeals case. The first time the record is received a case is correctly set up. The second time the record is received, a deputy clerk creates a case and then later realizes it is a duplicate. At that point, the case would be “voided”. A voided case should not be counted in statistics. A voided case number should not be re-used.</p>
<p>1.3 <i>Integrate to financial systems for receipting function if fees required/paid.</i></p>	<p>Does this function refer to internal CMS functions to generate receipts or does it refer to integration with an external financial system?</p>	<p>This refers to an external financial transaction which would be recorded in the CMS system. An example would be filing fees which were processed through an external e-filing system that then need to appear as a receipt in the CMS.</p>

<p>1.5.1 <i>Enable case statistical classification to be independent of case handling/processing classification.</i></p>	<p>Could you please provide some examples that illustrate what this requirement refers to?</p>	<p>Yes, this allows the case management system to count cases differently for statistical purposes than for case processing purposes.</p> <p>Examples:</p> <ol style="list-style-type: none"> 1. Family court cases are a subtype of civil case. They receive a Civil case number, but need to be counted independently as family court cases for statistical purposes. 2. Juvenile Anders cases are a special characteristic of juvenile case. They receive a juvenile case number and will be counted collectively with juvenile cases for statistical purposes, but case handling/processing will be unique to other juvenile cases.
<p>2.1.2.4.4 <i>All case members are in the same case stage</i></p>	<p>Could you please provide the definition of a case stage (are these similar to case statuses?) and an example?</p>	<p>Specific to section 2 [Case Consolidation] of the RFP, case stages and case statuses are synonymous. It is important to prevent consolidation of a closed cases with a pending case.</p> <p>In general, case stages are broader in the context of reporting than case statuses. Case stages are customized items that the court desires to track, but may or may not want to include as official benchmarks. Case statuses generally represents the official benchmarks.</p> <p>The court may set up a report to include a stage that corresponds to the filing date of specific briefs that precede the activation of a particular case status. A case stage could also be a case status, but a case stage will not always represent a case status.</p> <p>Example: Stage 1 - Opening Brief Filed; Stage 2 - Answering Brief Filed; Stage 3 - Reply Brief Filed; Stage 4/Status 1 - Case At Issue Date Noted</p>
<p>3.5.4 <i>Permit pattern matching in searches.</i></p>	<p>Could you please provide an example of a pattern match search?</p>	<p>An example of a pattern match search would be when a system user initiates a person search within the system by entering specific information such as last name and generation identifier. If the user entered "Johnson" as the last name and "Jr." as the generation identifier, the expected results would be a list of all persons in the system that contained both the last name of "Johnson" and generation identifier of "Jr."</p>
<p>3.6.2.2.1 <i>Automatically update attorney status upon adverse state bar matter decision for the attorney.</i></p>	<p>Could you please clarify whether these changes come from actions taken on a case in the Supreme Court system, or does this information also come from an external system (i.e. state bar)?</p>	<p>ASC does record outcome of disciplinary action taken, i.e., disbarred, suspended, censured by manually entering them into Appellamation. This requirement does not contemplate an existing external interface. The Court of Appeals view of Attorney status would be result of actions taken in the Supreme Court system, not from external system.</p>

<p>3.19.2 <i>Permit special designation for law firms.</i></p> <p>3.19.3 <i>Permit special designation for courts, other tribunals, administrative agencies and correctional facilities.</i></p>	<p>Could you please provide the definition and examples of special designation?</p>	<p>By special designation, we mean organizations created and maintained in system should include a way to optionally identify if the organization is a law firm, court or any other specific type of organization the court desires to track.</p> <p>Example: System user creates a new organization in the system entitled “Murphy Monroe LLC” and designates the organization as a law firm.</p>
<p>4.1.1.3 <i>Provide the ability to ‘harvest’ distribution postal and e-mail addresses, either interactively or during ingestion.</i></p>	<p>Could you please clarify what this requirement means?</p>	<p>This requirement presumes that postal and email address information will be provided with an e-filing submission. The expectation is that there will be a way to pull that information into the case management system so that distribution information does not need to be re-entered by court staff.</p>