

# PRIORITY 1 CIVIL MODIFICATIONS #2

Provided to: WILLIAMSON COUNTY, TX

SOW ID: 3632,3633,3635,3651

SCR #: 2013-3032

Date: May 22, 2013

Revision Date: October 23, 2013



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**SUNGARD**® PUBLIC SECTOR  
Connect the Community 

## **PRIORITY 1 CIVIL MODIFICATIONS #2**

### **TABLE OF CONTENTS**

<b>EXECUTIVE SUMMARY</b>	<b>1</b>
<b>PARTIES RESPONSIBILITIES</b>	<b>2</b>
<b>Client Responsibilities</b>	<b>2</b>
<b>Software / Hardware</b>	<b>2</b>
<b>Infrastructure</b>	<b>2</b>
<b>Customer Testing</b>	<b>2</b>
<b>SunGard Responsibilities</b>	<b>2</b>
<b>BACKGROUND</b>	<b>3</b>
<b>SPECIFICATIONS</b>	<b>3</b>
<b>REQUIREMENTS AND ASSUMPTIONS</b>	<b>8</b>
<b>DOCUMENTATION</b>	<b>8</b>
<b>TRAINING</b>	<b>8</b>
<b>PRICING</b>	<b>8</b>
<b>INSTALLATION</b>	<b>8</b>
<b>CONTRACT TERMS</b>	<b>9</b>
<b>PROJECT AUTHORIZATION</b>	<b>9</b>
<b>EXHIBIT A - SAMPLES OF ALTERNATE SERVICE LETTER</b>	<b>10</b>

## Executive Summary

WILLIAMSON COUNTY, TX (Customer) has requested that SUNGARD PUBLIC SECTOR INC. (SunGard) provide a written quote and Scope of Work (SOW) ordering SunGard to undertake the application software modification project more fully described herein (also referred to as “work” or “project” or “implementation”).

The purpose of this document is to provide a written SOW for this project that defines all SunGard deliverables, criteria for acceptance, resulting annual maintenance, hardware and infrastructure requirements, implementation schedule and other implementation considerations.

Items, features or functionality not specifically included in this document shall be considered outside of the SOW. Any future change will require a written Change Order approved by both parties, shall be subject to additional charges, and will likely have an impact on the implementation schedule. Change Orders shall not delay the implementation, acceptance, or payment in full of the accepted base functionality proposed within this document.

Please refer to the Section entitled, “Parties Responsibilities” which documents each party’s responsibilities, any project dependencies and other important related issues.

SunGard is providing the implementation services related to the application software only to meet the specifications contained in this SOW. All other components required for a successful implementation are the responsibility of the customer.

## Parties Responsibilities

### Client Responsibilities

#### Software / Hardware

The Customer is responsible for providing the following:

1. All equipment, system software and other components to meet the needs of this project.
2. All required hardware, cable and connectors and personnel to facilitate installation thereof.

### Infrastructure

The customer shall assign a full-time primary System Administrator (SA) and a backup System Administrator. This primary System Administrator will be SunGard's contact for all operational issues that require SunGard support. In addition, the Customer's System Administrators shall provide first line support to their own users for all application software.

### Customer Testing

Customer agrees to participate in a test period requiring Customer to test functionality outlined in the SOW. In addition, Customer understands that the customer test release version may also contain other new and unrelated development items that are also in a customer test stage.

### SunGard Responsibilities

1. Provide the Customer with a detailed SOW for the proposed work.
2. Deliver related application software/utilities to meet the specifications agreed upon in the detailed SOW.
3. Provide a project manager and assigned staff for the project.
4. Provide a Quality Assurance Representative to serve as the point person for technical issues associated with this SOW.

## Background

The Constables of Williamson County would like several changes to SunGard's Records Management and Mobile Field Reporting applications to better fit the workflow and requirements for their agencies. These changes are specific to the Warrant, Civil and Miscellaneous Receipts modules. These changes are from the Priority 1 list of items provided by Williamson County.

## Specifications

SunGard will provide the following to meet the needs of the customer:

### 1) Civil – Alternative Service Letters –

- a) Three new entries will be added to the dropdown list of letters that can be printed from the RMS Civil module when the state configuration = 'TX'. Each agency will be able to modify the content of the letters without affecting other agencies using the same system. Example of the letters can be found in [Exhibit A](#).
- b) Letters that will appear in the selection list include:
  - i) Alternate Service Rule 106
  - ii) Alternate Service Rule 536
  - iii) Alternate Service Rule 742A
- c) The RMS user will view the civil record eligible for alternate service, click the Letter button and select the appropriate letter from list. Information from the civil record will be used to automatically populate certain components of the letter.
- d) Each type of alternate service letter will document attempts to serve the civil paper using Tracking records associated with the current civil record. Only tracking entries having Track Code beginning with ATT will be included in the letter. Tracking codes related to attempts to serve begin with these letters. This will prevent other types of tracking activities from being added to the letter. The letters will be designed to accommodate as many tracking entries as possible. The actual number of tracking entries that can be printed on the letter is variable depending on the length of the tracking comments and the space remaining in the body of the letter. A smaller, but still readable, font may be used to maximize the number of tracking entries that can be contained in the letter while restricting the letter to a single page.
- e) Each letter will include the Cause number which is stored in the RMS Civil module in the Local # field (cpmain.local\_nbr). Other data elements that will be defaulted from the civil record include: the Plaintiff and Defendant, Court name, Officer and Dept ID (listed as the Affiant on the letter). The date the letter is printed will automatically default in the letter contents and the date "Sworn To and Subscribed".
- f) Samples of each letter were provided to SunGard. The format of these letters will be matched as closely as possible while allowing SunGard to make adjustments in format, font and layout

where necessary to achieve the intent of the letters. For example, the boxes around the attempts to serve section may be omitted to maximize the space and allow more tracking entries to print. Each letter will include a notary line as shown on the samples provided.

- g) SunGard will include an image control on the letter file which can be customized by each agency to print a badge or other bitmap image at the top center of the letter.

## 2) **Expand the length of certain fields in the RMS Civil Module -**

- a) Three fields in the RMS Civil module need to be expanded to allow more characters to be entered. The current length will not accommodate values required to match the civil process issued by the court
  - i) Matter (cpmain.cmatter) current length is 50. Expand to 100 characters
  - ii) Plaintiff (cpmain.plaintiff) current length is 50. Expand to 100 characters
  - iii) Docket number (cpmain.docketnbr) current length is 20. Expand to 50 characters
- b) SunGard will modify the Civil worksheet to ensure these fields are not truncated when printing values up to 100 characters.
- c) Several letters within the Civil module include the docket number. Because letter files are intended to be customized by the agency, SunGard does not typically deliver letter files as part of the application update to avoid overwriting customized versions of letter files with the generic default version maintained by SunGard. These letter files will need to be modified by the customer to expand the field so that longer values are not truncated. The RMS user interface includes a button to modify the letter report format to make this process easy for the customer.

## 3) **Default Local ID (Cause #) and defendant's name in the Receipt notes**

- a) When a payment is added to a Civil record, the software will automatically populate the Notes (sys\_recip.notes) with the Local ID and defendant's name from the parent civil record.
- b) Example:

**Civil Processing Payment Receipts [Edit]**

Receipt #  Date

Transaction Type  Amount   
Quantity  Total Collection

Payment Method  Revenue Code   
Check #  Check Date   
Paid By   
Collected By

Notes: Local ID: 12345  
Defendant: Smith, Mary Jane

Receipt #	Trans Type	Date	Quantity	Total Paid	Total Cost
43	SFSH	07/25/2012 09:19	1.00	15.0000	15.0000

**4) Option to prevent changing receipt date during data entry -**

- a) A new Agency Configuration setting to specify that receipt date must match the date entered. If this setting is enabled, the software will prevent users from changing the receipt date from the current date. This means that if data entry of a receipt is performed on a different day than the payment was actually made, the receipt will not reflect the date of the payment, but instead will reflect the date of the receipt was entered in RMS.

**5) Warrant Tracking Across Agencies –**

- a) SunGard will modify the MFR application to allow users who have been granted the *[ALL] Warrant Tracking - MFR* security right as part of an external group to be able to add tracking entries from MFR to warrants belonging to the agency granting external rights.
- b) The MFR application is already configurable to enable/disable warrant status changes from MFR. This setting is located in MobLAN | Mobile System Configuration | MFR3 tab and is labeled *Allow Warrant Status Changes from MFR*. If the agency associated with the warrant has not enabled this feature, MFR tracking records will not update the RMS warrant status no matter which agency submitted the tracking record.

**6) Default information on MCT Self-Init from Civil record similar to Security Check (S/) functionality –**

- a) SunGard will add a new Mobile Configuration setting to allow the agency to define a default Nature code to be used when P/ is entered as the Self-Init location.
- b) If a deputy types P/ followed by the Sys ID of a civil paper in the location field on the MCT Self Init screen, the software will query RMS for a matching record in the Civil module having

the same Sys ID value. No other criteria will be included in the search. If a match is found, the defendant's address shown on the RMS civil record will default in the Self Init Location field. The Sys ID, Paper type and the defendant's full name will default in the Self Init Comments field. If defined, the default Nature code for P/ initiated calls will be displayed in the Nature field. Otherwise, the deputy will select the appropriate nature code from the list.

Example: Typing "P/791" in the Location field will retrieve the following details from the corresponding RMS Civil record.

Self Initiated Activity

Enroute to this event

License Plate  State **TX** License Type **PC** License Year **2013**

Location **4900 OAK GARDEN DR** **WS**

Nature **CIVIL PROCESS**

Comments **CPMAINID:791  
 PAPER TYPEL WRITS OF POSSESSION - EVICTION  
 DEFENDANT: TEST, NAME RECORD**

Civil Processing [View]

Sys ID **791** Agency **HPP**

Page 1 | Page 2

Paper **WRITS OF POSSESSION - EVICTION** Issue By **CCP2** 05/06/2004 Local #

Received 05/07/2004 08:21 Alert Date 05/21/2004 Court **CCP2** Court/Expiration Date 05/21/2004

Status **SFSR** Date 05/26/2004 Docket # **04CV283** Service Type **PERS**

Plaintiff **US BANK NATIONAL ASSOCIATION** Addr  Matter

Serve To:

NameType **DF** Name **TEST, NAME RECORD** Race **W** Sex **F** DOB **12/12/1972** Age **31**

Address **4900** **OAK GARDEN DR** Apt  City **WINSTON-SALEM** St **TX**

Officer **THOMAS, GARY W.** Svc Dist **8700** Agency Id  Location

Bill To **WCCL** Check#  Sheriff Fee **0.00** Category **NO24**

Case #  label 1  label 2

Letter Worksheet Warrant

Previous Next Reset Duplicate Option Search View Exit Srch

- c) Similar to existing Security Check functionality, SQLAuto will be modified to create RMS Tracking records for each service attempt using the call Nature code and the CPMAINID (primary key) from the call notes field. SqlAuto configuration settings will be provided to enable or disable this feature and to define the CAD Nature code and the RMS Tracking Code to be used for attempted civil process service.
- d) **NOTE:** Automatic tracking requires the call notes to contain the cpmainid of the civil record. Editing or altering this information in the call notes may prevent the creation of a tracking record or cause the tracking record to be associated with the wrong RMS record.
- e) Tracking entries created by SQLAuto are intended exclusively to document attempts to serve the process and will not update the status of the RMS Civil record, even if the specified tracking code is configured to do so. If the paper service attempt is successful or if a different type of tracking entry needs to be created, the Constable Deputy will manually add an MFR tracking using the appropriate track code for service.

#### **7) Warrant Letters Printed by External Users**

- a) SunGard will create a new assignable security right to allow the Sheriff's Office to grant an external user rights to generate letters for WCSO warrants.( For example: [ALL] Warrant Letters by Ext Agcy). Constable users having this right as part of an external group will be able to click the Letter button within the RMS Warrant module while viewing a WCSO warrant record. The Letter screen will be displayed and the user can select from a list of available letters. The content of each letter is managed separately by each agency. This allows each agency to edit the content as appropriate for their agency without affecting the same letter for other agencies using RMS. The logged in user's agency determines the letter contents, not the agency associated with the warrant being viewed. This means that Constable users will only be able to generate letters managed by their agency and will not be able to generate a Williamson County Sheriff's Office letter even though the warrant agency code is WCSO. A tracking record is automatically added to the warrant when a letter is generated in RMS.
- b) A modification for the letter that refers to 742a, the number has changed and now needs to be replaced with 510.4(c)(1)(C)

#### **8) Warrant Module Summary and Statistical Reports –**

- a) SunGard will create a new security right that allows editing of the warrant module Officer and Service District fields. The Sheriff's Office can add this to the external rights group to allow Constable users to edit only these two fields while preserving "view only" functionality for other fields on the warrant record.
- b) SunGard has identified four reports that need modification to support an environment where the assigned officer's agency and the warrant agency are different. SunGard will make changes to the following reports:
  - i) Warrant Disposition Statistics by Officer

- ii) Warrant Received/Served Statistics by Division
  - iii) Warrant Received/Served Statistics by Document Type
  - iv) Warrant Paper Workload Statistics by Officer.
- c) Each of these reports assumes the assigned officer belongs to the same agency as the warrant.

## Requirements and Assumptions

1. Functionality not specifically listed in this SOW is considered to be out of scope. Additional functionality may require additional development funding.
2. SunGard reserves the right to make final cosmetic and functional design changes necessary to meet the objectives outlined in this SOW and to preserve current functionality within the product.
3. SunGard is only providing a custom software enhancement to SunGard applications. Customer agrees to be responsible for any additional hardware or software that may be required.

## Documentation

Documentation is not applicable.

## Training

End User training for this project is not applicable.

## Pricing

SunGard will perform its responsibilities under this SOW for \$50,000.00 and will be due at the completion

## Installation

SunGard is proposing to deliver the files necessary to fulfill the functionality described in this SOW as part of the OSR14.6.0 Customer Test (CT) release version.

Proposed delivery dates assume that this SOW is signed by an authorized representative of Customer and returned to SunGard no later than March 3, 2014. Failing to return the signed SOW by this date may result in this project being pushed to the next subsequent beta release.

## Contract Terms

The project detailed within this SOW shall be governed by the terms of the existing Software License, Services and Maintenance Agreement between the parties hereto.

## Project Authorization

SOW: # 3632,3633,3635,3651


SCR: #2013-3032

Title: **PRIORITY 1 CIVIL MODIFICATIONS #2**

As an authorized representative of Customer, I hereby agree to the terms of this SOW including all project specifications, party responsibilities, and pricing.

For:

Name of Agency

	Printed Name	Signature	Date
SunGard Public Sector Inc.	Claudia S Hufham		02/18/2014
	Printed Name	Signature	Date

**Exhibit A** - Samples of Alternate Service Letter



Cause # 11-0212-C368

NATIONAL AUTO FINANCE COMPANY  
 PLAINTIFF  
 VS  
WILLIAM C WALLER  
 DEFENDANT

368TH JUDICIAL DISTRICT COURT  
WILLIAMSON COUNTY, TEXAS

**Officer's Sworn Request for  
 Alternative Service Under Rule 106**

To the Honorable Judge of said Court:

As the law officer receiving the above citation for service of process, I, DEPUTY CONSTABLE PATRICK PACE, hereby request the Court to authorize alternative service under Rule 106 on the following named defendant:

WILLIAM C WALLER

by leaving a true copy of the citation, with a copy of the petition attached, with anyone over sixteen (16) years of age at the location specified below or by attaching a true copy of the citation, with a copy of the petition attached, to the door at the location specified below.

Officers of this Department have made diligent efforts to serve such citation at the addresses provided for service of the defendant named below. The Plaintiff has stated in Plaintiff's Sworn Complaint that Plaintiff knows of no other home or work address of the defendant in this County. I attempted service under Rule 106 at the following places on the following dates at the following times and was unsuccessfully, and I have therefore satisfied the requirements of Rule 106.

OFFICER	DATE	TIME	COMMENTS
<u>HARRELL</u>	<u>03/08/2011</u>	<u>5:06 P.M.</u>	No contact, tag left on front door at 1311 Rosie Lane, Cedar Park, TX 78613.
<u>HARRELL</u>	<u>03/08/2011</u>	<u>5:30 P.M.</u>	Per Jessi Doyer, Clerk, defendant called and stated he is out of town on business and will return the week of March 21, 2011.
<u>PACE</u>	<u>03/30/2011</u>	<u>11:20 A.M.</u>	No contact/left tag on front door at 1211 Rosie Lane, Cedar Park, TX 78613.
<u>PACE</u>	<u>04/06/2011</u>	<u>2:36 P.M.</u>	No contact/left tag on front door at 1211 Rosie Lane, Cedar Park, TX 78613. Previous tag gone and no vehicles in driveway.

\_\_\_\_\_  
 Deputy Constable.

Sworn to and subscribed before me on MONTH, DAY, YEAR

\_\_\_\_\_  
 NOTARY PUBLIC



CAUSE NO. 217900

TRAVIS CO ET AL  
PLAINTIFF

IN THE JUSTICE COURT, PRECINCT 2  
WILLIAMSON COUNTY, TEXAS

VS

HANNAH S CHONG, INDV & DBA BEIJING CHINA RESTAURANT  
DEFENDANT

**Officer's Sworn Request for  
Alternative Service Under Rule 536**

To the Honorable Judge of said Court:

As the law officer receiving the above citation for service of process, I, Deputy ROSS BROWN hereby request the Court to authorize alternative service under Rule 536 on the following named defendant(s): Hannah S Chong, Indv & DBA Beijing China Restaurant

Officers of this Department have made diligent efforts to serve such citation at the addresses provided for service of the defendant(s) named below. The Plaintiff has stated in Plaintiff's Sworn Complaint that Plaintiff knows of no other home or work address of the defendant in this County. I attempted service under Rule 536 at the following places on the following dates at the following times and was unsuccessful, and I have therefore satisfied the requirements of Rule 536.

OFFICER	DATE	TIME	COMMENTS
<u>HARRELL</u>	<u>03/08/2011</u>	<u>5:06 P.M.</u>	No contact, tag left on front door at 1311 Rosie Lane, Cedar Park, TX 78613.
<u>HARRELL</u>	<u>03/08/2011</u>	<u>5:30 P.M.</u>	Per Jessi Doyer, Clerk, defendant called and stated he is out of town on business and will return the week of March 21, 2011.
<u>PACE</u>	<u>03/30/2011</u>	<u>11:20 A.M.</u>	No contact/left tag on front door at 1211 Rosie Lane, Cedar Park, TX 78613.
<u>PACE</u>	<u>04/06/2011</u>	<u>2:36 P.M.</u>	No contact/left tag on front door at 1211 Rosie Lane, Cedar Park, TX 78613. Previous tag gone and no vehicles in driveway.

\_\_\_\_\_, Deputy Constable

Sworn to and subscribed before me on 12/15/2011.

\_\_\_\_\_  
Justice Court Clerk for Williamson  
County or Notary Public

Cause # **JC-110718**

**INTERNATIONAL RESIDENCES APTS**  
Plaintiff

IN THE JUSTICE COURT  
PRECINCT **ONE**  
WILLIAMSON COUNTY, TEXAS

Vs.

**SMITH, JOHN**  
Defendant(s)

OFFICER'S SWORN REQUEST FOR ALTERNATIVE SERVICE UNDER RULE 742A

As the law officer receiving the above citation for service of process, I hereby request the court to authorize alternative service under Rule 742A on the following Defendant(s): **Smith, John, 9815 Copper Creek Dr #1000, Austin, TX 78729.**

The below Affiant has personal knowledge that diligent efforts to serve such citation have been made at all known address of the Defendant(s) named in the original sworn complaint. The below Affiant also has personal knowledge that Deputy Constable(s) have attempted Service under Rule 742 at the following places on the following dates at the following times and was unsuccessful, and, therefore, the Constable's requirements for requesting a Rule 742a have been satisfied.

**8/29/2011 @ 2021 NO CONTACT LEFT DOOR HANGER**  
**8/30/2011 @ 0834 NO CONTACT DOOR HANGER STILL THERE**

\_\_\_\_\_  
Affiant's Signature.  
**John Smith#5878**

SWORN TO AND SUBSCRIBED before me on this the **30<sup>th</sup>** day of **August, 2011.**

\_\_\_\_\_  
Notary Public/Peace Officer, State of Texas