RFQ: OCE17 CM1 CASEBUDGETINGDATABASE
OFFICE OF THE CIRCUIT EXECUTIVE
U.S. FEDERAL COURTS OF THE NINTH CIRCUIT

Questions and Answers:

1. Are you looking for a training component to this project? Would the vendor build part of the experience and teach the client how to implement the rest?

   Yes, there will be a training component. The vendor will build the site (i.e. experience) and teach staff at the Office of the Circuit Executive (OCE) how to implement the rest. The OCE would request a technical review or code walk-through when completed. In addition, the OCE would like to have a quick weekly review of functionality (maximum one hour a week) for the two months that the project is being developed.

2. As this is an internal-facing application, can the vendor assume use of a base theme, or will this be a custom-styled application with a full design phase?

   The only base theme the OCE has in place is the seen from the screen shots in the bid. The OCE is not committed to this theme per se and are open to other ideas as far as the design and application go. The theme the OCE chose in the screen shots was a free Drupal theme, which seemed to work well for the prototype.

3. Are all workflow and rules portions of the application net new and are not in the current state?

   Yes, workflow and rules of the application are net new and are not in the current state.

4. Are user roles built out? Partially or fully? Is the vendor able to reassess the roles? Is the application currently actively in use?

   User roles are partially built out. The administration role is more complete than the attorney role. The vendor will be able to reassess the roles, since those roles will need to be modified. The application is not currently active. It was strictly a prototype.

5. Are funding authorization conditions formalized language that is repeated across budgets? Should the funding conditions be centrally managed?

   Yes, the majority of the language are repeated across budgets depending on the type (capital habeas, mega cases, court of appeals cases), but a template for the language can be created. Yes, the funding conditions would be centrally managed.

6. How are counsel rates set for court-appointed budgets?

   The rates are set by Congress. They are adjusted infrequently- every few years or less.

7. Enhanced budgeting reports - can you give some examples of what this would be?

   A budgeting report could include entering the district court name (ex: District of Arizona) and seeing all of the cases that have been budgeted in the last 6 months. Fields in the report would include Case Name, District Name, Case Number, Defendant Name, Total Hours Requested in the Budget, Total Hours approved. In running a report, there are currently created field types that the vendor can select. However there are multiple ways to proceed. See screen shot below.

Home

All Cases

Select an Expert or Service Provider

Psychologist
Voice/Audio Analyst
Psychiatrist
Polygraph
Paralegal
Pathologist/Medical Examiner
Weapons/Firearms/Explosive Expert
Other Medical
Other

Case Type - Any -

Case Number

Budget # - Any -

Case Stage - Any -

Case Managing Attorney - Any -

Apply Reset

Form: Mega Case Budgeting Form

Case Number/Defendant Name	Budget Status	District Court	Type	Status	Stage	Budget #	Attorney Hours Approved	Attorney Hours Billed	Grand Total Expert and/or Service Provider Approved	Budget pdf	Funding Authorizatiion
34563456 Ben	in progress	AZ	Drugs		Pretrial	#1	0		0		
123918239 Smith	submitted	AK					40		0		
35000 Testing another User	in progress		Fraud		Sentencing	#3	0		0		
4444 iPad Test	submitted		Homicide	Closed	Trial + Sentencing	#8	0		0		

8. Service providers and experts
   - Can an attorney create a new entry?

     Yes, an attorney can create a new entry. There are thousands of providers within the 9th Circuit. It would be very difficult to create a drop down list for this.

   - Can it then be accessed by other attorneys?

     It cannot be accessed by other attorneys.

   - Is there any curation/deduping/validation of the list of providers, or workflow around their creation?

     No, there is not. A drop down menu that would auto-populated with the names of the attorneys that create budgets would be ideal. There is currently no workflow around their creation.

- Is this searchable data, or one big dropdown? Are there filters by provider type?

  Admin role would like this data to be searchable.   The OCE would like to be able to filter by provider type. Currently, in the example, there is only one (see in the screenshot above).

9. Search functionality can get very large very quickly, but this is the most business-critical functional area. Are there default searches that are run regularly (or highly desired) from a reporting perspective? Are there views and reports that can be prioritized over others?

   Common searches would be looking up cases by district, provider type and hourly rate, and total hours approved in a budget.   Ideally there would be a default view that listed active cases by district name, case type, Case Managing Attorney name, case status, similar to what is seen in the screenshot above.

10. Is there a target budget and/or timeline in mind that we can be sure we take into account in the presentation of a proposal?

    Approximately 2 months' time for the build and possibly include implementation if it can work in this timeframe. Please submit your best dollar amount for the project.