City of New Orleans

Office of Information Technology and Innovation (ITI)

OPSO JMS Vendor Evaluation Feedback

# 1. Executive Summary

This document contains specific and general observations for the various vendor solutions for OPSO's Jail Management System (JMS) procurement (#147248).  These observations were based on the review of each vendor's Technical proposal, software demonstrations, and Q&A sessions.

The following table provides a summary of ITI's evaluation of the seven (7) JMS offerings.  Detailed information is provided in Section 2.

| Offering | ITI Evaluation |
|---|---|
| ATMIS's JMS | Adequate solution with extensive customization |
| Zuercher's JMS | Inadequate solution |
| Black Creek's "SallyPort" | Adequate solution with moderate customization |
| Securus' "xJail" | Inadequate  Solution |
| Intellitech's "IMACS" | Fully Compliant with RFP with moderate Customization |
| Tyler Technologies' "CMS" | Inadequate Solution |
| Global Tel Link's "OMS" | Fully Compliant with RFP with minimal customization |

Note: ITI's evaluation is only one perspective of the evaluation committee and may or may not represent other OPSO evaluators.

## 2. Evaluation Details

### 2.1. ATMIS

The following observations relate to ATMIS's JMS offering. ARMIS' JMS offering is an adequate solution based on the requirements in the RFP and the identified customizations. However, the level of customization required is extensive. Customizations present a significant level of added cost and time. There will also be additional risks and possibility of future product support complications.

| Category | Differentiators | Summary Evaluation |
|---|---|---|
| **Technical Proposal** | The following functions require custom changes.<br>• MICR printing<br>• Printing/displaying of overdue classifications<br>• Special conditions within classifications<br>• Drag-and-drop of inmate locations (future version)<br>• Ineligible bonding agents and property<br>• Maximum bonding and suspensions for bonding agencies<br>• Bonding agents and recovery agents.<br>• Time credit with date ranges<br>• Special Sentencings conditions<br>• Sentencings adjustments and credit time<br>• 39 (all) of the Case Management requirements<br>• Individual Service Plans (ISPs)<br>• Program transfers<br>• Program eligibility requirements<br>• Integrated HSED, GED tracking<br>• Multiple employment and work release<br>• Work status and suspended pay<br>• Program Reentry functions<br>• Deposit Holds<br>• Freeze of accounts<br>• Global and individual withdrawal and deposit restrictions<br>• Contract-based billing<br>• Automatic posting of deposits/withdrawals<br>•  Batch processing of deposits/withdrawals<br>• Unique IDs for Cash drawers<br>• Cost recovery, administrative fees<br>• Zero deposits<br>• Return of unencumbered funds upon release<br>• Digital signatures for banking transactions<br>• Work release tracking and administration<br>• Restrictions of viewing "non-guilty" dispositions. | Adequate solution with extensive customization |

| Category | Differentiators | Summary Evaluation |
|---|---|---|
| | <ul><li>29 Separate mandatory functions (all of them) within the Commissary category.</li><li>Single item releases</li><li>Tracking unclaimed articles</li><li>Images of returned property</li><li>Medication administration via hand-held device</li><li>Pick list of incident statuses</li><li>Evidence and chain of custody tracking</li><li>Automated medical treatment tracking</li><li>Use of force tracking</li><li>Appeal process tracking</li><li>7 (all) of the functions for Warrant requirements</li><li>Off-site and video visitations</li></ul>The following functions are not provided in the offering.<ul><li>Reconcile of multiple accounts</li><li>Unlimited bank accounts and transfers thereof</li></ul> | |
| Demonstration | <ul><li>Good user interface</li><li>Significant functionality not available in core product</li></ul> | Good |
| Other Considerations | <ul><li>Thin client deployment</li><li>Open SQL-based database</li><li>No experience within Louisiana</li></ul> | |

## 2.2.  Zuercher

The following observations relate to Zuercher's JMS offering.  Their JMS solution as proposed is inadequate based on the requirements provided in the RFP.

| Category | Differentiators | Summary Evaluation |
|---|---|---|
| Technical Proposal | The following functions require custom changes.<ul><li>15 (all) of the workflow/status monitoring technical requirements</li><li>Bar code generation</li><li>Commitment type linked to out-of-country billing</li><li>TIFF format for scanned documents</li><li>Current OPSO armband integration</li><li>10 of the 25 functions within the classification functional requirements</li><li>Review and decision making for classifications</li><li>Billing for housing for jurisdictions</li><li>Calculation of additional time</li><li>Unassigned credit time</li><li>Tiered billing rates</li><li>Securing activity logs by workstation</li><li>Incoming data from court systems</li><li>Business rule based transitions of imported data</li></ul> | Inadequate solution |

- Different types of offender appointments
- Multiple housing assignments in batch mode and queues
- Recount procedures
- Individual Service Plans (ISPs)
- Transitions from program to program upon completion
- Eligibility criteria for programs
- Rosters of program instructors and volunteers
- All 11 functions related to employment and work release, Reentry Plan, Service programs, Home monitoring
- Fees related to start and end dates and releases
- Inmate requests
- Freezing and placing holds on accounts for deposits and withdrawals
- Cost recovery to multiple accounts
- Contract based billing for agencies
- Identification of outside bank accounts
- Zero dollar transactions
- Digital signature for financial transactions
- Report of reconciled checks
- 3 (all) of the functions related to work release accounting requirements
- Reporting restitution actions
- Restricted viewing of "non-guilty" dispositions
- Single finger check for inmate release
- Report for monthly average counts by institution
- 15 (all) of the functions for Inmate Grievances
- History of property disposals
- Confiscation of property
- Notification of other groups based on results of medical screens
- Administration of medicines via hand-held device
- Past incarceration medical history
- Inmate calendars
- Calendar conflict warning and prevention
- 7 (all) of the functions for meal counts
- 5 of the 6 functions for Inmate Requests
- Password protection of STG module
- One-off remote visitation

The following functions are not included in offering.
- Button-level user security
- User-defined on-line help
- Spell check for all fields
- General public deposits

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| | • Kiosks<br>• Distribution of funds upon release<br>• Work hours and pay to accounts<br>• External user access to trusts<br>• Integration with telephone system<br>• Automated posting to accounts<br>• Batch processing of deposits and withdrawals<br>• Cost recovery defined collection order<br>• User defined types of deposits for cost recovery<br>• Pre-Release check failure triggering overrides and color coding<br>• 23 (majority) of the functions for Commissary<br>• Registration of sick call via kiosk | |
| **Demonstration** | • Demonstrations somewhat unorganized<br>• User-Defined drop downs<br>• Strong JMS functionality but missing several core functions<br>• Strong user-defined reports/dashboards with export to excel<br>• Extensive functionality missing from solution | Good |
| **Other Considerations** | • Five (5) implementations within Louisiana<br>• No Kiosk HW<br>• No mail/package tracking module<br>• No request module<br>• Cell counts are simple manual process<br>• No automated reclassification module<br>• Thick client<br>• Incomplete financial module<br>• No support for inmates as system users | |

## 2.3. Black Creek

The following observations relate to Black Creek's "SallyPort" JMS offering. Black Creek' JMS offering is an adequate solution based on the requirements in the RFP and the identified customizations. The level of customization required is moderate which will present added cost and time. There will also may be additional risks and possibilities of future product support complications.

| Category | Differentiators | Summary Evaluation |
|---|---|---|
| **Technical Proposal** | The following functions require custom changes.<br>• User defined help.<br>• Interfaces for external agencies.<br>• Armband integration.<br>• Inmate placement "drag-and-drop."<br>• Maximum bond limit per agency.<br>• Incoming data from external systems with workflow.<br>• Batch housing with queue.<br>• Program waiting lists and priorities based on request type.<br>• 34 Separate mandatory functions within the Accounting category.<br>• Accounting notification of Restitutions<br>• Restriction of viewing "non-guilty" dispositions<br>• Color coding for pre-release audit<br>• 29 Separate mandatory functions (all of them) within the Commissary category.<br>• Kiosk requests for sick visits.<br>• Remote video visitation | Adequate solution with moderate customization |
| **Demonstration** | • Good user interface<br>• User-Defined drop downs<br>• Strong, core JMS functionality<br>• Limited Accounting functions<br>• No Commissary or accounting features but provided with customization<br>• Limited workflow functions<br>• Limited user-defined business rules | Good |
| **Other Considerations** | • Limited experience within Louisiana<br>• Open SQL Database | Fair |

## 2.4.    Securus

The following observations relate to Securus' "xJail" JMS offering.  Their JMS solution as proposed is inadequate based on the requirements provided in the RFP.

| Category | Differentiators | Summary Evaluation |
|---|---|---|
| **Technical Proposal** | The following functions require custom changes.<br>• User defined help.<br>• Status monitoring and user-defined thresholds<br>• Sentencing conditions<br>• Flagging of absconders<br>• Freezing of inmate accounts<br>• Restarting of discipline process<br>• Warrant inquiries from warrant database<br>• 7 Functions (all) of the Warrant requirements<br>• Kiosk requests<br>The solution does not include the following:<br>• Generation of bar codes<br>• Categorization of menus by functional groups<br>• Ineligible bond payers and property<br>• Flagging records as public/private<br>• Individual Service Plans (ISPs)<br>• Identification of high-risk program needs<br>• Transitions from program to program<br>• Program eligibility management<br>• Program instructor/volunteer rosters<br>• Program waiting lists<br>• Program Re-entry Plans (goals, risks, referrals)<br>• Community Service program agency lists<br>• Service hour tracking<br>• Home monitoring<br>• Cost recovery<br>• Offender obligation history<br>• Holds for deposits<br>• Automated and manual checks<br>• General ledger<br>• Batch entry of deposits and withdrawals<br>• Identification of outside banks<br>• Spending limits and restricted items from canteen<br>• Inmate refunds<br>• FIFO, costing for Inventory<br>• Multiple warehouses and transfers<br>• Sales by multiple package quantities<br>• Lists of unclaimed property<br>• Kiosk requests for sick visits.<br>• Tiger integration | Inadequate Solution |

| Demonstration | • Good interactive demo<br>• Excellent Dashboards<br>• Good user interface<br>• User-Defined drop downs with historical tracking of changes<br>• Strong, core JMS functionality<br>• Good drag and drop inmates with incompatible checking<br>• Good historical reporting platform<br>• Strong classification-based cell assignments<br>• Cell transfers based on classification requires small custom change.<br>• Strong user-defined queues and event processing<br>• Full EMR solution<br>• Strong Commissary modules<br>• Open SQL-based database | Excellent |
|---|---|---|
| **Other Considerations** | • Thick Client<br>• Web-based front-end on the horizon | Good |

## 2.5.  Intellitech

The following observations relate to Intellitech's "IMACS" JMS offering.  Their offering is a Fully Adequate solution based on the requirements in the RFP and the identified customizations.  The level of customization required is moderate which will present added cost and time.  There will also may be additional risks and possibilities of future product support complications.  IMACS is also a thick client solution with limited "web-based" capabilities.

| Category | Differentiators | Summary Evaluation |
|---|---|---|
| **Technical Proposal** | The following functions require custom changes.<br>• Limit terminal access by user<br>• Search notes by keyword<br>• Deposits to inmate accounts by general public<br>• Global deposit and withdrawal restrictions<br>• Cash drawer support<br>• Identification of outside bank accounts<br>• Printing of checks for work release<br>• User-defined color coding for pre-release audit checks<br>• Average costing and FIFO inventory methods<br>• Identification of multiple vendors for inventory items<br>• Purchase order support for inventory | Fully Compliant with RFP with moderate Customization |
| **Demonstration** | • User-defined configuration<br>• Dashboard features<br>• Support for all major functional areas<br>• Interactive Cell layout/map | Good |

| Category | Differentiators | Summary Evaluation |
|---|---|---|
| **Other Considerations** | • Thick client<br>• No experience within Louisiana | |

## 2.6.    Tyler Technologies

The following observations relate to Tyler Technologies' "CMS" JMS offering.   Their JMS solution as proposed is inadequate based on the requirements provided in the RFP.

| Category | Differentiators | Summary Evaluation |
|---|---|---|
| **Technical Proposal** | The following functions require custom changes.<br>• Biometric reader processing<br>• Electronic jail card<br>• Deposits to commissary by general public<br>• Kiosk support<br>• Generation of debit cards upon release<br>• Automatic deductions from trust accounts for canteen and other fees<br>• Single finger identification of inmates<br>• Kiosk support<br>• Fingerprint system for inmate lookup<br>The following functions are not supported in the offering:<br>• Font, color, and position for data formats<br>• Allow for invisible fields<br>• Review/workflow processing is not in all modules<br>• Limit terminal access by user<br>• Benchmarks and alerts within monitored process<br>• Limited Web-based access<br>• User-defined, context sensitive help, SOPs, and universal notes<br>• Support for OPSO's current armband<br>• Ineligible payers for bonds<br>• Setting of maximum bonds by agency<br>• Suspending of bond agency<br>• Authorized bond agents and payers<br>• Work assignments and eligibility by job type<br>• Lock down activity logs by terminal<br>• Prioritization of calendar by types<br>• Disallowing of conflicting calendar activities<br>• Alerting of staff for unscheduled movements<br>• Comparison of counts and alters for discrepancies<br>• Eligibility requirements for treatment programs and lists of ineligible inmates<br>• Waiting lists for eligible inmates for programs<br>• Reentry plan and track referral planning | Inadequate Solution |

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|---|---|---|
| | • Community service, service hours, and home monitoring<br>• Hold on deposits by timeframe<br>• Transfers of funds<br>• Check printing<br>• Global restrictions for deposits and withdrawals<br>• Unlimited GL accounts by defined periods<br>• Recovery of funds by percentages<br>• Batch entry of transactions<br>• Cash drawers with unique IDs<br>• Cost recovery deductions<br>• Deposit slip printing<br>• Work release deposits based on payment plans<br>• Hard copy and online notification of restitutions<br>• Restrict viewing of "non-guilty" dispositions<br>• Warnings and overrides for pre-release audit checks<br>• User-defined color codes for pre-release<br>• Cash and debit card functions for trusts upon release<br>• Grievance numbers by y/m/d<br>• Grievance transaction reports<br>• Grievance reports by staff member<br>• 18 of the 29 functions for Commissary requirements<br>• Lists of unclaimed items<br>• Notification of users based on Initial screening<br>• Medical history from previous arrests<br>• Drop-down lists for medical screening<br>• Registration of sick calls by kiosk<br>• Tracking for evidence, medical treatment, and use of force for incidents<br>• 6 (all) functions for inmate requests<br>• RMS integration | |
| **Demonstration** | • Good drag and drop for activities<br>• Searchable text<br>• Strong user-defined configuration<br>• Strong dashboard features<br>• Complete solution for all major functional areas<br>• No keep separates on POD level<br>• No auto flag for PREA | Excellent, but incomplete |
| **Other Considerations** | • Thick client<br>• Multiple implementations within Louisiana | |

## 2.7. Global Tel Link

The following observations relate to Global Tel Link's "OMS" JMS offering. The OMS solutions is superior to all other offerings based on compliance with all mandatory and desired requirements stated in the RFP. As the industry leader, Global Tel Link's OMS offering provide added assurance for product stability and future support.

| Category | Differentiators | Summary Evaluation |
|---|---|---|
| **Technical Proposal** | The following functions require custom changes.<br>• Integration with Tiger | Fully Compliant with RFP with minimal customization |
| **Demonstration** | • User-defined configuration<br>• User-defined workflow<br>• Support for business rules using stored procedures<br>• Good features for alerts<br>• Dashboard features<br>• Good feature for copy charges<br>• Support for all major functional areas<br>• Hand-held, mobile, and kiosk support | Excellent |
| **Other Considerations** | • Thin client with heavy Java footprint. Thinner client in future version<br>• Published, open DB schema<br>• Experience within Louisiana<br>• Very large installed base<br>• Leading JMS provider for over 30 years with over 700 employees | |