



MULTNOMAH COUNTY OREGON

BOARD OF COUNTY COMMISSIONERS
ROOM 605, COUNTY COURTHOUSE
1021 S.W. FOURTH AVENUE
PORTLAND, OREGON 97204

GLADYS McCOY • Chair • 248-3308
PAULINE ANDERSON • District 1 • 248-5220
GRETCHEN KAFOURY • District 2 • 248-5219
CAROLINE MILLER • District 3 • 248-5217
POLLY CASTERLINE • District 4 • 248-5213
JANE MCGARVIN • Clerk • 248-3277

AGENDA OF
MEETINGS OF THE MULTNOMAH COUNTY BOARD OF COMMISSIONERS
FOR THE WEEK OF
July 18 - 22, 1988

Tuesday, July 19, 1988 - 1:30 PM - Informal Meeting . . Page 2
Thursday, July 21, 1988 - 9:30 AM - Formal. Page 3

Tuesday, July 19, 1988 - 1:30 PM

Multnomah County Courthouse, Room 602

INFORMAL

1. *OK* Informal Review of Bids and Requests for Proposals:
 - a) Burnside Bridge Sidewalk Rehabilitation
 - b) Typewriter & Calculator Repair Service
2. Informal Review of Formal Agenda of July 21
3. Briefing on Portland's plans for annexation during FY 1988-89 - Susan McPherson, Portland Urban Services Manager

Thursday, July 21, 1988, 9:30 AM

Multnomah County Courthouse, Room 602

Formal Agenda

1. Celebration of the County Fair which will open July 26

CONSENT CALENDAR

DEPARTMENT OF ENVIRONMENTAL SERVICES

- OK
- C-1 Order accepting Deed from Edith L. Brooks on SE 138th Avenue for Public Road Purposes
 - C-2 Order accepting Deed from David S. and Teresa G. Sprando on Charlton Road for County Road Purposes

REGULAR AGENDA

BOARD OF COUNTY COMMISSIONERS

- OK
- R-3 In the matter of appointments to the Community Health Council of Katherine A. Ricker, ^{Dr.} Barry Egner, and Dr. Patsy Kullberg, terms expiring June 30, 1990
 - R-4 In the matter of the re-appointment of Jane Spence and the appointment of Wanda Moman to the Portland/Multnomah Commission on Aging, terms expiring July, 1991
 - R-5 In the matter of the appointment of Larry McCagg and reappointments of Dorothy Gage, William Hoffstetter, Joseph Mendez and Hosie Stadamire to the Community Corrections Advisory Committee, terms expiring June 30, 1990

DEPARTMENT OF ENVIRONMENTAL SERVICES

- NO 9
- R-6 In the matter of ratification of an Intergovernmental Agreement between the City of Portland, Metropolitan Service District, City of Lake Oswego, Multnomah County, and Clackamas County, authorizing the City of Portland to purchase the Jefferson Street Rail Line on behalf of the 5 governments, and commits the County to pay \$45,975 during FY 88-89 into a purchase and preservation fund which cannot be used for rail operation

ORDINANCES - DEPARTMENT OF ENVIRONMENTAL SERVICES

- OK
- R-7 Second Reading - An Ordinance amending Multnomah County Code Chapter 9.10 (Building and Mechanical Code)
 - R-8 Second Reading - An Ordinance amending Multnomah County Code Chapter 9.20 (Electrical Code)
 - R-9 Second Reading - An Ordinance amending Multnomah County Code Chapter 9.30 (Plumbing Code)

PUBLIC CONTRACT REVIEW BOARD

(Recess as the Board of County Commissioners and reconvene as the Public Contract Review Board)

- R-10 Order in the Matter of Exempting from Public Bidding a Contract with Portland General Electric Company and General Telephone of the Northwest for the Conversion of Street Lighting on 257th

(Recess as the Public Contract Review Board and reconvene as the Board of County Commissioners)

DEPARTMENT OF GENERAL SERVICES

- R-11 Order in the Matter of Designation of Newspaper for Publication of Notice of Foreclosure of Tax Liens as Shown on the Multnomah County 1987 Foreclosure List

ORDINANCES - DEPARTMENT OF GENERAL SERVICES

- R-12 Second Reading - An Ordinance relating to the Business Income Tax, and amending MCC 5.70

DEPARTMENT OF JUSTICE SERVICES

- R-13 In the matter of Ratification of an Intergovernmental Agreement with the City of Portland Police Bureau to provide photographic darkroom services for the Sheriff's Office for period July 1, 1988 to June 30, 1989

ORDINANCES - DEPARTMENT OF HUMAN SERVICES

- R-14 First Reading - An Ordinance relating to Food Service Inspection Fees, Swimming Pool License Fees, and Tourist and Travelers Facilities Inspection Fees, and amending MCC 5.10

*Free Obvious back
change to change RFC/RFP
or just why not*

NOTE: ITEMS R-15 AND R-16 WILL BE DISCUSSED TOGETHER

- R-15 First Reading - An Ordinance adopting an Ambulance Service Plan and amending MCC 6.31.039

DEPARTMENT OF HUMAN SERVICES

- R-16 Order in the matter of approving a Request for Credentials and Requests for Proposals for Emergency Ambulance Service

NOTE: No action will be taken on this item until July 28.

BOARD OF COUNTY COMMISSIONERS

- R-17 Joint Resolution of the Board of Commissioners of Multnomah County and Columbia County, in the Matter of Recommending State and Federal Funds to be Used to Complete the Sturgeon Lake Restoration Project
- R-18 Resolution in the Matter of AIDS Names Project Quilt
- R-19 Budget Modification Nondepartment #1 making an appropriation transfer in the amount of \$10,000 from General Fund Contingency to Juvenile Justice, County Supplements, for interim funding of Project Way (Outward Bound) in order that it can continue at the same service level as in the past while attempting to raise private funds
- R-20 In the matter of ratification of an intergovernmental agreement with the City of Portland wherein the County provides financial support (\$60,000) for the City's annexation effort for period through June 30, 1989

*Forward to
✓ ()
NAC*

Thursday Meetings of the Multnomah County Board of Commissioners are recorded and can be seen at the following times:

- Thursday, 10:00 PM, Channel 11 for East and West side subscribers
- Friday, 6:00 P.M., Channel 27 for Rogers Multnomah East subscribers
- Saturday 12:00 PM, Channel 21 for East Portland and East County subscribers

REVISED INFORMAL AGENDA FOR JULY 19, 1988

Tuesday, July 19, 1988 - 1:30 PM

Multnomah County Courthouse, Room 602

INFORMAL

1. Informal Review of Bids and Requests for Proposals:
 - a) Burnside Bridge Sidewalk Rehabilitation
 - b) Typewriter & Calculator Repair Service
2. Informal Review of Formal Agenda of July 21
3. Data Processing Management Update and Funding Recommendations for 1988-89 - Linda Alexander

The following matter will be rescheduled to another time:

Briefing on Portland's plans for annexation during FY 1988-89 - Susan McPherson, Portland Urban Services Manager

BIDS



MULTNOMAH COUNTY OREGON

BOARD OF COUNTY COMMISSIONERS
JUL 19 1988 PM 2:15

DEPARTMENT OF GENERAL SERVICES
PURCHASING SECTION
2505 S.E. 11TH AVENUE
PORTLAND, OREGON 97202
(503) 248-5111

gfr 7/19/88
#1

GLADYS MCCOY
COUNTY CHAIR

BOARD OF COUNTY COMMISSIONERS
MULTNOMAH COUNTY OREGON
JUL 13 1988 PM 2:15

MEMORANDUM

TO: Jane McGarvin, Clerk of the Board
FROM: Franna Ritz, Acting Director, Purchasing Section
DATE: July 12, 1988
SUBJECT: FORMAL BIDS AND REQUESTS FOR PROPOSALS SCHEDULED FOR INFORMAL BOARD

The following Formal Bids and/or Professional Services Request for Proposals (RFPs) are being presented for Board review at the Informal Board on Tuesday, July 19, 1988.

Bfd/RFP No.	Description/Buyer	Initiating Department
B61-600-3017	BURNSIDE BRIDGE SIDEWALK REHABILITATION Buyer: Franna Ritz Ex. 5111	DES/TRANSPORTATION Contact: Stan Ghezzi Phone: X3595
B45-800-3015	TYPEWRITER & CALCULATOR REPAIR SERVICE Buyer: Roger Bruno Ex. 5111	DGS/Purchasing Contact: Roger Bruno Phone: 5111
		Contact:
		Buyer: Ex. 5111 Phone:

cc: Gladys McCoy, County Chair
Board of County Commissioners
Linda Alexander, Director, DGS

Copies of the bids and RFPs are available from the Clerk of the Board.

TO: DAILY JOURNAL OF COMMERCE

Please run the following Classified Advertisement as indicated below, under your "CALL FOR BID" section

MULTNOMAH COUNTY

Proposals Due: August 2, 1988 at 2:00 P.M.

Proposal No. B45-800-3015

Sealed proposals will be received by the Director of Purchasing, 2505 S.E. 11th Ave., Portland, OR 97202 for:

Typewriter and Calculator repair Service on a requirements

basis for one year with two optional one year renewals

as per specifications on file with the Purchasing Director. No proposal will be received or considered unless the proposal contains a statement by the bidder as part of his bid that the requirements of ORS 279.350 shall be included. Multnomah County reserves the right to reject any or all proposals.

Specifications may be obtained at: Multnomah County Purchasing Section
2505 S.E. 11th Avenue
Portland, OR 97202
(503) 248-5111

Lillie M. Walker, Director
Purchasing Section

PUBLISH: July 21, 22 & 25, 1988

AD2:PURCH2

TO: The Portland Business Today/DJC

Please run the following Classified Advertisement as indicated below, under your CALL FOR BIDS section.

MULTNOMAH COUNTY

Burnside Bridge Sidewalk Rehabilitation

Bids Due August 9, 1988 at 2:00 P.M.
Bid No. B61-600-3017

Sealed bids will be received by the Director of Purchasing, Multnomah County Purchasing Section, 2505 S.E. 11th Ave., Portland, OR 97202 for:
Removal and replacement of reinforced concrete, concrete patching, epoxy injections, replacement of steel beams and structural steel painting.

Plans and Specifications are filed with the Purchasing Director and copies may be obtained from the above address for a \$5.00 non-refundable fee. **CHECKS AND MONEY ORDERS ONLY.** Plans and Specifications will not be mailed within the Tri-County area.

PREQUALIFICATION OF BIDDERS: Pursuant to the Multnomah County Public Contract Review Board Administrative Rules (AR 40.030) Prequalification shall be mandatory for this project for the following class(es) of work: Reinforced Concrete, and Structural Steel Bridges and Grade Separation Structures.

Prequalification applications or statements must be prepared during the period of one year prior to the bid date. Prequalification application or proof of prequalification by the Oregon Department of Transportation must be actually received or postmarked to Multnomah County by not later than 10 days prior to bid opening.

All bidders must comply with the requirements of the prevailing wage law in ORS 279.350.

Details of compliance are available from the Purchasing Section, Division of Administrative Services, 2505 S.E. 11th Avenue, Portland, OR 97202, (503) 248-5111.

Contractors and subcontractors must be licensed for asbestos abatement work if the project involves working with asbestos.

MINORITY AND WOMEN BUSINESS UTILIZATION: All bidders are hereby specifically advised that these conditions require a minimum of 10% of the total bid amount for Minority Business Enterprise participation in one or more of the following subcontract areas: bidder's option, and 2% of the total bid amount for Female Business Enterprise participation in one or more of the following subcontract areas: bidder's option.

NONDISCRIMINATION: Bidders on this work will be required to comply with the provisions of Federal Executive Order 11246. The requirements for Bidders and Contractors are explained in the Specifications.

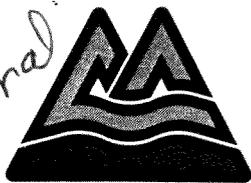
No proposal will be considered unless accompanied by a check payable to Multnomah County, certified by a responsible bank, or in lieu thereof, a surety bond for an amount equal to ten percent (10%) of the aggregate proposal. The successful bidder shall furnish a bond satisfactory to the Board in the full amount of the contract.

Multnomah County reserves the right to reject any or all bids.

LILLIE WALKER, DIRECTOR
PURCHASING SECTION

Publish July 21, 22, & 25, 1988

Informal
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MULTNOMAH COUNTY OREGON

7/19/88
Inf # 3

DEPARTMENT OF GENERAL SERVICES
PORTLAND BUILDING
1120 S.W. FIFTH, 14TH FLOOR
PORTLAND, OR 97204-1934

OFFICE OF THE DIRECTOR
BUDGET & MANAGEMENT
ANALYSIS
COUNTY COUNSEL
EMPLOYEE RELATIONS
FINANCE DIVISION

(503) 248-3303
(503) 248-3883
(503) 248-3138
(503) 248-5015
(503) 248-3312

BOARD OF COUNTY COMMISSIONERS
GLADYS McCOY, CHAIR
PAULINE ANDERSON
POLLY CASTERLINE
GRETCHEN KAFOURY
CAROLINE MILLER

MEMORANDUM

TO: Board of County Commissioners

FROM: Linda Alexander, Chair
Data Processing Management Committee *Linda Alexander*

DATE: July 19, 1988

SUBJECT: Data Processing Management Committee Recommendations to the Board

The Data Processing Management Committee met on Thursday, July 7, 1988 to consider the following major items:

- **Status Report on "A" Priorities from the 1987-88 information systems plan**
 - Development projects
 - Feasibility studies
- **Approve projects for funding by dedicated funds**
 - Assessment & Taxation's system improvements
 - Alarm Ordinance System - MCSO
 - Inmate Accounting and Commissary system - MCSO
- **Approve projects for 1988-89 funding by DPMC appropriation subject to Board approval.**

The Committee took the following actions and is making the following recommendations to the Board:

- **That the Board receive the 6/30/88 status reports on "A" Priority projects funded in 1987-88, see Attachment 1**
 - **Development projects**
 - Human Services Health Care Management System
 - Civil Process System
 - Aging Services System

- **Feasibility studies (executive summaries attached - complete copies available on request)**
 - Integration of CPMS/JAWS/SRMS - Sheriff's Office
 - Animal Control Field Services Tracking
 - Social Services Case Management Requirements Definition
 - DES Road Fund Cost Accounting
 - District Attorney PROMIS Conversion/Integration Project
 - Assessment & Taxation system improvements
- **That the Board approve the recommendation to proceed with the dedicated funds projects - see Attachment 2**
 - Assessment & Taxation improvements
 - Alarm ordinance system
 - Inmate accounting and commissary system
- **Based on the feasibility studies and the ICJIS project recommendation, that the Board approve the recommended funding from the Data Processing Management Committee's 1988-89 dedicated appropriation of \$211,230 and approve \$80,000 for a first quarter contingency budget modification for the following projects:**

\$169,910	• Integration of CPMS/JAWS/SRMS - Sheriff's Office
70,280	• Animal Control Field Services Tracking
*51,000	• *Integrated Criminal Justice System Framework Project (Attachment 3)
<hr/>	
\$291,190	• Total funding required
211,230	• Balance in Special Appropriation \$200,000 1988-89 and \$11,230 Carryover
<hr/>	
<u>\$ 79,960</u>	• <u>Additional funding required from Contingency</u>

* The Framework Project is a request made from the DPMC to the Board to fund a Data Architecture development and Standard data definition study which will allow ISD to expand upon the work being done to integrate the Sheriff's systems. This will build the architecture which will allow us to both standardize and integrate a future District Attorney's system, the State court system interface and provide the Data Structure to guide the future integration of other systems such as community corrections and probation. This project would be developed concurrently with the Sheriff's systems.

Background

There was no 1988-89 budget request forwarded to the Board to fund the 1.2-1.8 million dollar integrated criminal justice system project as presented by David Bogucki's report of January 14, 1988.

Even though dedicated funding for a full system project was not provided, the Data Processing Management Committee believes that the integration of the systems in the Sheriff's Office are a high priority and should go forward and be funded from the Committee's Annual Special Appropriation.

They also believe, however, that other system needs such as Animal Control should not continue to be neglected because the limited \$200,000 a year new development money is used up by criminal justice needs. The DPMC believes that the Board should fund new development requirements for integrating the justice systems. Even though maintenance hours (Base ISD Budget) are used and combined with the \$200,000 to fund new development, we are facing funding issues in the next few years such as:

- \$175 - \$200,000 to replace the District Attorney's PROMIS system and fully integrate with the Courts and the criminal justice framework
- Other criminal justice system integration such as community corrections and probation
- Countywide cost accounting
- Human Services Case management
- Assessment & Taxation system completion

2611F/LA/js

Attachments

cc: Data Processing Management Committee

**ATTACHMENT 1: PROJECTS FUNDED IN 1987-88
(EXCLUDING ICJIS)**

STATUS REPORTS - JUNE 30, 1988
EXECUTIVE SUMMARIES OF FEASIBILITY STUDIES

STATUS REPORTS - JUNE 30, 1988



MULTNOMAH COUNTY OREGON

CIVIL PROCESS SYSTEM DEVELOPMENT PROJECT
STATUS REPORT TO JUNE 30, 1988

CIVIL PROCESS SYSTEM DEVELOPMENT PROJECT
STATUS REPORT TO JUNE 30, 1988

OVERVIEW

The Automated Civil Process system of the Multnomah County Sheriff's Office is actually comprised of two subsystems: The Civil Process system and the Civil Commitment system.

The Civil Process portion is an online service/process tracking system. The "case number" is the basic unit around which data is collected. (This number is internally assigned by the MSCO Civil Process section and is generated strictly for the purposes of this subsystem.) Information captured consists of plaintiff, defendant(s), types of processes to be served, address where defendant is to be served, date/time of service, etc. From the time a process is received in the civil process office, the system is able to keep a running log of its status. That is, the user will be able to determine how many attempts were made to serve that process, date and time of the attempts, the deputy who made the attempts, date/time the process may have been placed on hold or closed out, and, if it was closed, the reason why the deputy was unable to serve the process. The system also keeps track of daily deputy statistics such as total miles driven, total papers served and returned, hours spent with a levy, waiting, or working in civil commitment. Special information may also be kept of file pertaining to a specific address. Management personnel, for example, may assign a "caution flag" to an address alerting the deputies to any known dangers about the residents. This caution status stays in effect for 30 days unless management reviews it and extends the caution end date. A list of defendants served at any given address will be available throughout this system.

Queries for the Civil Process subsystem may be done by case number, defendant name, service address, process type, case status, deputy BPST, etc. The Civil Process subsystem also includes a batch portion that creates printed reports of the online queries as well as generating service jackets and some of the standard letters-of-return.

The Civil Commitment subsystem is a much smaller portion of the civil process system. It captures information pertaining to involuntary commitments to County mental health facilities. Data includes names, date and time of the hearing, results of the hearing, facility that the client is transferred to, and reason for the commitment. The batch portion of the Civil Commitment subsystem includes printed reports of the online queries (such as query by name, facility, types of results, etc.) as well as monthly statistical reports.

CIVIL PROCESS SYSTEM DEVELOPMENT PROJECT
STATUS REPORT TO JUNE 30, 1988

STATUS

The Civil Process portion of the Civil Process System is nearing completion. Online and batch programs are approximately 99% complete. A request to add an additional field to the name file ("TRUE-COPIED-BY") will require some program and documentation changes. However, this is expected to have only a minor effect on the completion date. User documentation is approximately 95% complete.

Terminals and printers have been installed and tested as well as LEDS interfacing (with the exception of the laser printer).

A meeting was held Tuesday, June 21, with Ralph Baker from the Civil Commitment Unit. Several changes and enhancements were agreed upon. Again, although much of the online programming had been completed, these modifications should have little impact on the completion date. Approximately 90% of the online programming and 25% of the batch programming for the Civil Commitment Subsystem has been completed. User documentation has not yet begun.

CONCERNS

Problems occurred when testing was done on printers having 4-digit TID numbers. It was eventually determined that the problem was in the subroutine "JE99", which is commonly used for spooled reports. This program apparently cannot handle a TID number larger than 3 digits. A special set of programs has since been written to handle this. However, because of the fact that the Hansen Building and the Jail now have both 3-digit and 4-digit TID printers, all programs within SRMS that use the "JE99" subroutine to spool their reports, must be modified to use the new programs. This will be a time-consuming task and one that should be completed before Civil Process goes into production.

Alcatel Corp. (formerly "Courier") has arranged for a demonstration on Wednesday, July 6, of their laser printer. Following this, testing should be able to get under way for the functions requiring output to this printer.

CIVIL PROCESS
PROJECT FINANCIAL REPORT

TOTAL PROJECT ESTIMATE: HRS - 993 \$35,748
 CURRENT FISCAL YEAR: 87/88
 CURRENT MONTH: JULY

USER DEPARTMENT: SHERIFF
 PROJECT CODE: MJCA
 MONTH: JUNE

	<u>ESTIMATED HOURS</u>	<u>ACTUAL HOURS</u>	<u>ESTIMATED DOLLARS</u>	<u>ACTUAL DOLLARS</u>
SYSTEM REQUIREMENTS	72	68.5	\$ 2,592	\$ 2,466
EXTERNAL DESIGN/RFP	40	19	1,440	684
INTERNAL DESIGN	75	58	2,700	2,088
IMPLEMENTATION PLAN	16	16	576	576
PROGRAMMING	650	455.5	23,400	16,398
SYSTEM TEST	45	82.5	1,620	2,970
USER TRAINING*	45	162	1,620	5,832
INSTALLATION	50	0	1,800	0
POST IMPLEMENTATION REVIEW	—	—	—	—
	933	861.5	\$35,748	\$31,014

*Includes all user documentation.

6-30-88

Civil Process System Development Project
Status Report to June 30, 1988

1/3

ACTIVITY	Planned start	Planned end	Planned estimate
CivilPro Plan	10-26-87	8-19-88	299ed
System Requirements	10-26-87	11-06-87	2w
External Design/Analysis	11-09-87	12-08-87	4w
Internal Design	12-09-87	12-30-87	3w
Programming	1-04-88	8-05-88	215ed
Civil Process	1-04-88	8-05-88	215ed
Civ Pro On-line Programming	1-04-88	5-13-88	19w
Civ Pro Batch Programming	4-01-88	5-05-88	5w
Civ Pro Purge System Programming	7-25-88	8-05-88	2w
Civil Commitment	6-01-88	7-18-88	48ed
Civ Com On-line Programming	6-01-88	7-20-88	7w
Civ Com Batch Programming	7-05-88	7-18-88	2w
Testing	4-25-88	8-12-88	110ed

6-30-88

Civil Process System Development Project
Status Report to June 30, 1988

2/3

ACTIVITY	Planned start	Planned end	Planned estimate
Civil Process	4-25-88	8-12-88	110ed
Civ Pro On-line System Testing	5-09-88	5-30-88	3w
Civ Pro Batch System Testing	4-25-88	5-13-88	3w
Civ Pro Purge System Testing	8-01-88	8-12-88	2w
Civil Commitment	7-11-88	7-22-88	12ed
Civ Com On-line System Testing	7-11-88	7-22-88	2w
Civ Com Batch System Testing	7-12-88	7-18-88	1w
Documentation	5-16-88	8-10-88	87ed
Civil Process	5-16-88	8-10-88	87ed
Civ Pro On-line System Documentation	5-16-88	6-15-88	22d
Civ Pro Batch System Documentation	6-20-88	6-24-88	1w
Civ Pro Purge System Documentation	8-08-88	8-10-88	3d
Civil Commitment	7-12-88	7-25-88	14ed

6-30-88

Civil Process System Development Project
Status Report to June 30, 1988

3/3

ACTIVITY	Planned start	Planned end	Planned estimate
Civ Com On-line System Documentation	7-12-88	7-25-88	2w
Civ Com Batch System Documentation	7-19-88	7-25-88	1w
Training	6-24-88	8-19-88	57ed
Civ Pro On-line System Training	6-24-88	7-08-88	2w
Civ Com On-line System Training	8-14-88	8-19-88	1w

6-30-88

Civil Process System Development Project Status Report to June 30, 1988

1

1987
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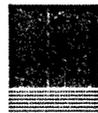
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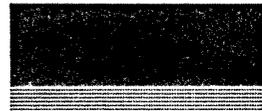
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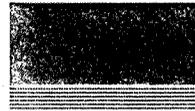
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System Requirements

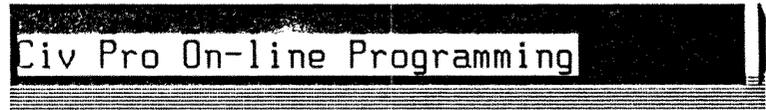


External Design/Analysis



Internal Design

Civ Pro On-line Programming



□ Plan

┆ Res. Delay

| Today

■ Actual

▨ Reference

6-30-88

Civil Process System Development Project Status Report to June 30, 1988

2

1988

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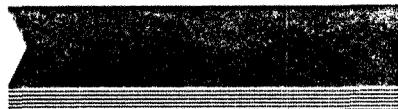
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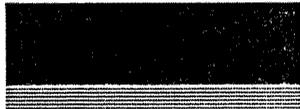
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Sep

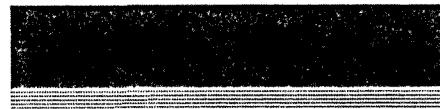


Civ Pro On-line Programming

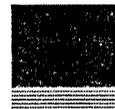


Civ Pro Batch Programming

Civ Pro Purge System Programming



Civ Com On-line Programming



Civ Com Batch Programming

□ Plan

┆ Res. Delay

| Today

■ Actual

▨ Reference

6-30-88

Civil Process System Development Project Status Report to June 30, 1988

3

1988
Apr

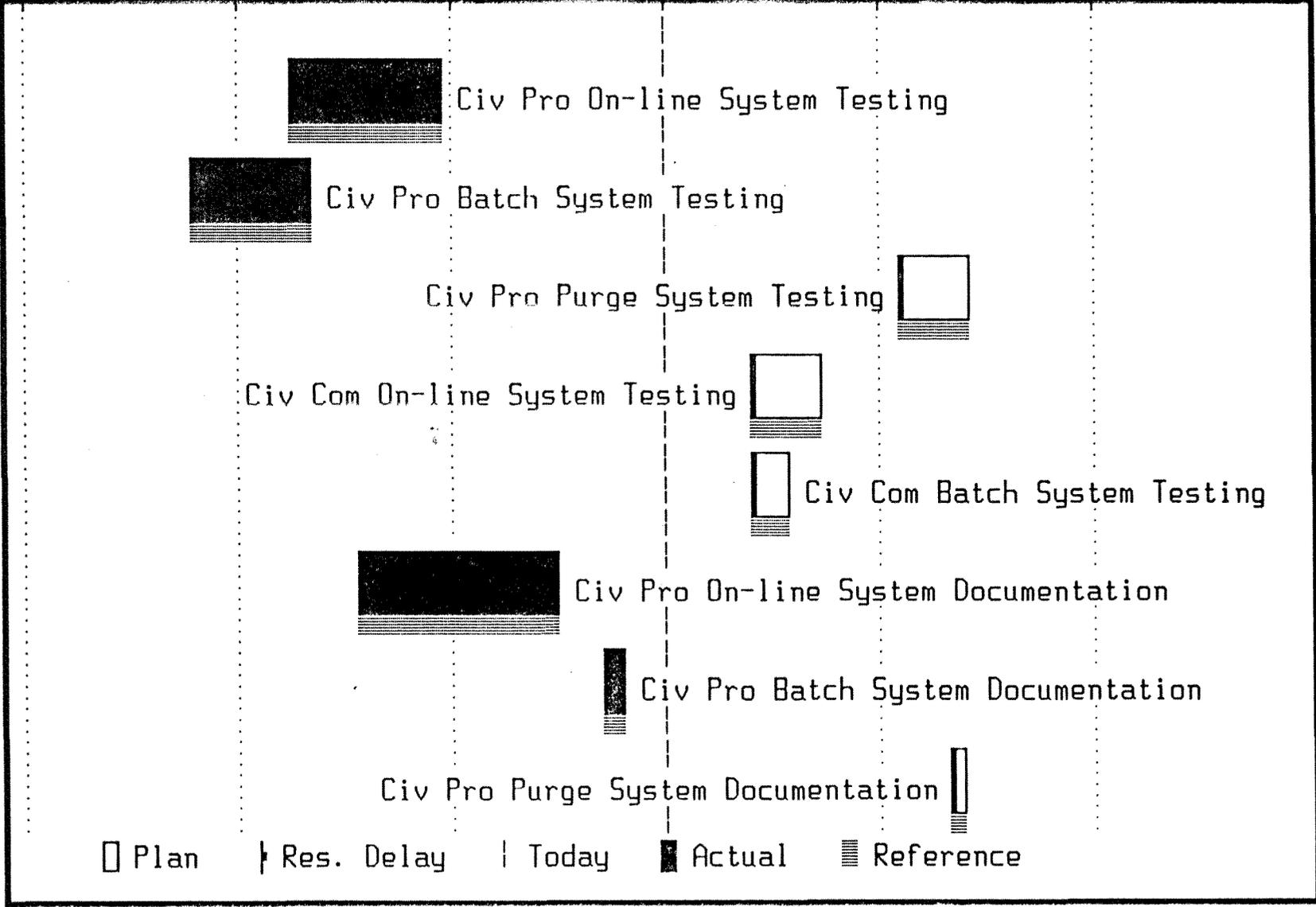
May

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6-30-88

Civil Process System Development Project Status Report to June 30, 1988

4

1988
Apr

May

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Civ Com On-line System Documentation



Civ Com Batch System Documentation



Civ Pro On-line System Training

Civ Com On-line System Training



□ Plan

┆ Res. Delay

| Today

■ Actual

▨ Reference



MULTNOMAH COUNTY OREGON

HUMAN SERVICES HEALTH CARE MANAGEMENT SYSTEM

STATUS REPORT TO JUNE 30, 1988

HUMAN SERVICES HEALTH CARE MANAGEMENT SYSTEM

OVERVIEW OF EXISTING INFORMATION SYSTEM

Generally, two distinct components of the existing information system can be identified: 1) The encounter system and 2) The Multicare or Membership Management Information System. The systems are currently poorly integrated, and some duplication of information exists.

The "encounter" system functions as the client tracking/utilization system for all health services provided in County clinics (clinic health services include medical, dental, optometric, lab and pharmacy) and the field health services provided in client homes by community health nurses. The encounter forms are the sole input documents for the system. Data collected on the forms are input by three data entry clerks via an on-line system in a unit located within the division's administrative offices. This unit is scheduled to be dissolved with the advent of the new HIS.

Data is maintained by the County Information Services Division (ISD) on an IBM compatible, AMDAHL mainframe, in several files on a data base management system, ADABAS. ADABAS is enhanced by the Fourth Generation programming aid called NATURAL, which is marketed by the same vendor, Software AG. The new HIS will be created on ADABAS, as well, and as many programs as possible, should be created in NATURAL. Special specific permission from the Health Division will be required for each program not developed in NATURAL. Vendors will be asked to utilize NATURAL as much as possible in their programming specifications, with COBOL as the secondary alternative, with permission.

At present, approximately 950,000 encounter/service records and 120,000 client records are stored in the data base. About 500 MB of storage are required, not including overhead for the system. Nearly 17,000 records are processed in order to produce regular monthly reports with 50,000 processed for quarterly reports and 200,000 processed for yearly reports.

As part of the new programming effort, and prior to conversion and implementation, a purge back to approximately three years of history will be made. No part of the arrangements for this purge need be considered by the vendors in their proposals, as it will all be designed and carried out by County personnel.

The second component of the existing information system is the Multicare or Membership Management System. This system was originally developed to track a different sort of pre-paid program and to a degree, it has been adapted to provide information on Multicare enrollees, but it does not function adequately. Its major deficiencies are in the area of automated

claims processing and utilization reporting. It is also not well integrated with the encounter system.

Our present resources fail to provide for information needs in four general areas of concern.

First, the membership management component of the system is inadequate. We are unable to obtain accurate encumbrance and risk information, to pay claims in any sort of automated fashion, or to produce reliable and automated statistical data on outside utilization.

Second, components of the existing system are not linked. This fragmentation of resources causes duplication of storage and entry resources and prevents us from directly relating utilization of outside and internal services. We are, thus, unable to produce information necessary to perform effective case management or risk assessment.

Third, the existing system cannot adequately track and handle client related costs and charges. We cannot bill clients, Medicare, or any other third-party payers other than some Medicaid in an automated fashion. We cannot even say for certain what a given client owes.

Finally, existing resources do not provide the sort of modern productivity improvement tools available to the health care industry. Our current system neither deals with appointments nor aids in patient intake and egress.

The new Health Information System addresses each of these area of concern.

SUMMARY OF KEY FEATURES OF THE NEW SYSTEM

The following describes, in very general terms, the kinds of access to information within the new HIS.

A. New functionalities to be added to Health Centers

- 1) A client tickler, or messaging system is available for clinic use. Messages are of two types and two levels of severity. First, messages will be either of set format or free-form. Second, messages will be able to be keyed by all staff, or certain messages will only be able to be keyed by staff with a given level of security.
- 2) As part of the file re-designs required for these functions, the Encounter System and the Membership Management System will be fully integrated. The membership information becomes merely a subset of all client information.
- 3) On-line updates and adds of client records and information, primarily at patient intake and egress.
- 4) Increased inquiry and update access to client file will be allowed. Clerks and others routinely need access to information

from the client file. Payments and clinic patient fee balances due are among the information needed at Health Centers.

- 5) On-line update of clinic patient fees. This will be available at any time, but primarily would take place at patient egress.
- 6) The on-line chart locator function allows any user at an HD terminal to inquire about the location of any patient chart, from on his or her own desk to molding away in archives over the last five years.
- 7) The on-line inquiry system has been greatly enhanced to support all of the functionalities spelled out above, and below.
- 8) A batch process remains available to support those HD functions which are performed where a terminal is not possible or economically feasible.

B. New functionalities for Fiscal Service

- 1) On-line claims processing, automated checking of authorizations, and client eligibility status. Fiscal services staff will enter data from invoices (claims from community providers) and inquire against both client and authorization tracking data files in order to verify eligibility and to confirm authorizations for referral services. Check requests for authorizing payment are then produced, with the ability to make only partial payment based on various payment schemes (percentage reimbursements).
- 2) Reports are available about potential bills outstanding, and outside payment totals for various individuals and pre-paid groups; reports for individuals will be available monthly for those with stop-loss problems; for pre-paid programs four separate program reports will be prepared. The system will produce the check requests (hard copy).
- 3) The new system has the ability to generate automated bills for all but the most complicated services when a client is eligible for Medicaid, Medicare, and standard, Third-Party insurances such as Blue Cross. For Medicaid and Medicare, these bills will be produced on magnetic tape. For other third party insurers, the bills will be produced on the HCFA 1500 form.

HUMAN SERVICES
HEALTH CARE MANAGEMENT SYSTEM
STATUS REPORT TO JUNE 30, 1988

STATUS

The bulk of the outstanding design issues were completed in June, leading toward starting the coding of the program prototyping.

The data base files were created and are ready to be loaded with test data.

The Tables File (a small system in itself) was started and coded in June, with minor cleanup taking place in July.

CONCERNS

The conversion project is still behind schedule. The project will be started in early July with additional resources from ISD.

Changes from the original design have been made, causing some additional effort, but other developments, such as Natural Security will offset this time by eliminating much of the coding that would have been necessary with "custom coding security" as originally planned.

HEALTH CARE MANAGEMENT SYSTEM
PROJECT FINANCIAL REPORT

TOTAL PROJECT ESTIMATE: 9,151 hrs. \$414,800
 CURRENT FISCAL YEAR: 87/88
 CURRENT MONTH: JULY

USER DEPARTMENT: HEALTH
 PROJECT CODE: MHHP
 MONTH: JUNE

	<u>ESTIMATED HOURS</u>	<u>ACTUAL HOURS</u>	<u>ESTIMATED DOLLARS</u>	<u>ACTUAL DOLLARS</u>
FINALIZE DESIGN	1614	1115	\$ 73,162	\$42,897
CONVERSION	1243		56,345	
PROGRAMMING	4800	486	217,584	\$31,447
SYSTEM TESTING	726		32,909	
HARDWARE INSTALLATION	200		9,066	
TRAINING	224		10,154	
SYSTEM INSTALLATION	48		2,176	
SYSTEM TURNOVER/ACCEPTANCE	296		13,404	
POST IMPLEMENTATION REVIEW	—	—	—	—
		1601	\$414,800	\$74,344

7-06-88

Health Care

1/2

ACTIVITY	Planned start	Planned estimate
Health-Status Plan	4-01-88	186ed
Contract Agreement	4-01-88	12d
Project Planning/Control	4-19-88	8d
Finalize Design	4-29-88	158ed
Resolve o/s Issues	4-29-88	20d
Security	4-29-88	10d
Front-end	4-29-88	10d
Tables	5-02-88	24d
Conversion	7-11-88	60d
Data-Base	4-29-88	5d
Forms	4-29-88	57d
File Cleanup	6-01-88	362h
System Prototype	6-10-88	47d

7-06-88

Health Care

2/2

ACTIVITY

Planned
start

Planned
estimate

Design Test System
.....

7-15-88
.....

19d
.....

Acceptance Test
.....

7-25-88
.....

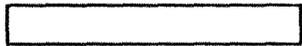
14d
.....

7-06-88

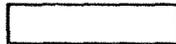
Health Care

1

Mar 1988
28 4 11 18 25 May 2 9 16 23 30 Jun 6 13 20



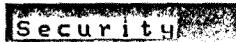
Contract Agreement



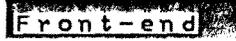
Project Planning/Control



Resolve o/s Issues



Security



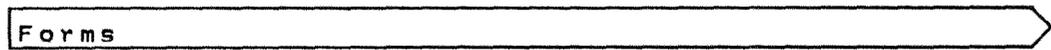
Front-end



Tables



Data-Base



Forms

□ Plan † Res. Delay | Today ■ Actual ≡ Reference

7-06-88

Health Care

2

Jun 1988
27 4

11

18

25

Aug
1

8

15

22

29

Sep
5

12

19

Conversion

Forms

□ Plan

┆ Res. Delay

| Today

■ Actual

≡ Reference

7-06-88

Health Care

3

Mar 1988
28 4

11

18

25

May
2

9

16

23

30

Jun
6

13

20

File Cleanup

System Prototype

□ Plan

┆ Res. Delay

| Today

■ Actual

≡ Reference

7-06-88

Health Care

4

Jun 1988
27 4 11 18 25 Aug 1 8 15 22 29 Sep 5 12 19

File Cleanup

System Prototype

Design Test System

Acceptance Test

□ Plan † Res. Delay | Today ■ Actual ≡ Reference



MULTNOMAH COUNTY OREGON

AGING SERVICES SYSTEM DEVELOPMENT PROJECT
STATUS REPORT TO JUNE 30, 1988

AGING SERVICES SYSTEM

OVERVIEW

To remove the current system from the City of Portland's VAX machine and process information on the County's mainframe computer.

By re-writing this system for the County's computer, the goal of sharing information (who, when, what) across divisional lines within the Department of Human Services may be satisfied.

The present system must be maintained by City personnel familiar with the computer language utilized on the VAX computer.

Once the system is performing on the County's mainframe, the maintenance, enhancements and sharing of information will be performed using the same data base, language and teleprocessing monitor as will be used on other new or enhanced Human Services systems.

AGING SERVICES SYSTEM
STATUS REPORT TO JUNE 30, 1988

STATUS

No progress made in June. Requirements documentation to begin July 18, 1988. Project will have the benefit of groundwork completed by the Health Care System in complying with standards, goals of Multnomah County.

CONCERNS

The person assigned was committed to other projects.

Project is now starting too late to cancel contract with the City by December 31, 1988. Provisions should be made as soon as possible to extend this contract.

AGING SERVICES
PROJECT FINANCIAL REPORT

TOTAL PROJECT ESTIMATE: 1,022 hrs. \$49,200 USER DEPARTMENT: AGING SERVICES
CURRENT FISCAL YEAR: 87/88 PROJECT CODE:
CURRENT MONTH: JULY MONTH: JUNE

	<u>ESTIMATED HOURS</u>	<u>ACTUAL HOURS</u>	<u>ESTIMATED DOLLARS</u>	<u>ACTUAL DOLLARS</u>
PROGRAMMING				
SYSTEM TESTING				
HARDWARE INSTALLATION				
TRAINING				
SYSTEM INSTALLATION				
SYSTEM TURNOVER/ACCEPTANCE				
POST IMPLEMENTATION REVIEW	_____	_____	_____	_____

*No expenditure of funds until contract is signed and programming begins.

7-06-88

Aging-Services

1/2

ACTIVITY	Planned start	Planned estimate
Aging-Services Plan	7-18-88	271ed
Requirements	7-18-88	380mh
Design	10-14-88	200mh
R.F.P.	11-18-88	46ed
Preparation	11-18-88	55mh
Approval	12-01-88	5d
Bid Process	12-08-88	18d
Vendor Selection	1-03-89	3d
Contract Agreement	1-06-89	3d
Programming	1-11-89	79ed
Prototype	1-11-89	140mh
Program Modules	1-24-89	640mh
Documentation	3-21-89	60mh

7-06-88

Aging-Services

2/2

ACTIVITY	Planned start	Planned estimate
Testing	3-28-89	40mh
User Acceptance	3-29-89	1d
System	3-30-89	15ed
Test	3-30-89	40mh
Documentation	4-03-89	40mh
User Training	4-07-89	30mh
User Acceptance	4-11-89	3d

7-06-88

Aging-Services

1

1988

Apr

May

Jun

Jul

Aug

Sep

Requirements

□ Plan

┆ Res. Delay

| Today

■ Actual

▨ Reference

7-06-88

Aging-Services

2

1988
Oct

Nov

Dec

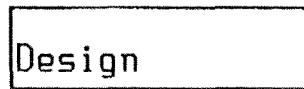
1989
Jan

Feb

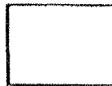
Mar



Requirements



Design



Preparation



Approval



Bid Process



Vendor Selection



Contract Agreement



Prototype

□ Plan

┆ Res. Delay

| Today

■ Actual

▨ Reference

7-06-88

Aging-Services

3

1988
Oct

Nov

Dec

1989
Jan

Feb

Mar

Program Modules

Documentation

Testing

User Acceptance

Test

□ Plan

▤ Res. Delay

| Today

■ Actual

▨ Reference

EXECUTIVE SUMMARIES OF FEASIBILITY STUDIES

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EXECUTIVE SUMMARY

SHERIFF OFFICE CPMS AND JAWS INTEGRATED SYSTEM

SECTION 1

PURPOSE:

This request is for development funds for the Sheriff's Office CPMS and JAWS System. The new system will be a replacement for the present CPMS and JAWS systems currently in operation in the Sheriff's Office.

FUNDING SOURCE	TOTAL	PERSONNEL	MATERIALS & SERVICES	CAPITAL
ISD* DEPT*				
DPMC	\$169,410	\$30,000	\$134,910	\$4,500
OTHER FUNDS** NONE				
PROJECT COST	\$169,410	\$30,000	\$134,910	\$4,500

*Budgeted
**Contingency Funds, Grant, Etc.

RISK SCORE: 38.4

0 ----- 50 ----- 100
LOW RISK HIGH RISK

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EXECUTIVE SUMMARY

A&T APPRAISAL, ASSESSMENT & COLLECTION SYSTEM

SECTION 2

PURPOSE:

This request is for development funds to do a Requirements Definition for the Assessment and Taxation Department computer system. The ultimate goal is to replace the current system. A new system will assist A&T in complying with Oregon Statutes and better serving the County and taxpayer needs.

FUNDING SOURCE	TOTAL	PERSONNEL	MATERIALS & SERVICES	CAPITAL
ISD*	\$ 48,144	\$ 48,144		
DEPT*	\$ 90,908	\$ 90,908		
DPMC	\$ 49,280		\$ 49,280	
OTHER FUNDS** NONE				
PROJECT COST	\$193,332	\$139,048	\$ 49,280	\$5,000

*Budgeted

**Contingency Funds, Grant, Etc.

RISK SCORE: 49.4

0 ----- 50 ----- 100
 LOW RISK HIGH RISK

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EXECUTIVE SUMMARY

SOCIAL SERVICES CASE MANAGEMENT SYSTEM

SECTION 3

PURPOSE:

This request is for funds for a Requirements Study. The study would address the compatibility and consistency of the Social Services Division requirements with those needs identified by the Dept. of Human Services.

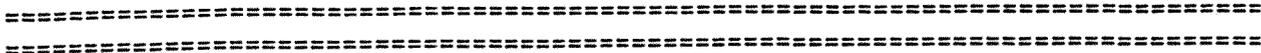
The requirements study will address data availability and data sharing between sections, divisions and departments.

FUNDING SOURCE	TOTAL	PERSONNEL	MATERIALS & SERVICES	CAPITAL
ISD*	\$ 840	\$ 840		
DEPT*	\$16,800	\$16,800		
DPMC	\$30,670		\$30,670	
OTHER FUNDS** NONE				
PROJECT COST	\$48,310	\$17,640	\$30,670	

*Budgeted
**Contingency Funds, Grant, Etc.

RISK SCORE: 25.5

0 ----- 50 ----- 100
LOW RISK HIGH RISK



EXECUTIVE SUMMARY

PROSECUTOR'S PROMIS SYSTEM CONVERSION

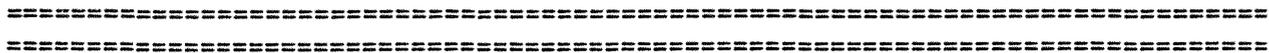
SECTION 4

PURPOSE:

The feasibility study for the Prosecutor's PROMIS system indicates no action should be taken at this time to convert or redesign the system.

TOTAL PROJECT COST: \$0

RISK SCORE: None required.



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EXECUTIVE SUMMARY

ANIMAL CONTROL FIELD SERVICES

SECTION 5

PURPOSE:

This request is for development funds for an Animal Control Field Services Tracking System. This system will replace those procedures using manual files and outdated information. The dollars reflected are for a system to be built and maintained within a fiscal year.

FUNDING SOURCE	TOTAL	PERSONNEL	MATERIALS & SERVICES	CAPITAL
ISD*	\$ 1,680	\$ 1,680		
DEPT*	\$10,080	\$10,080		
DPMC	\$70,280		\$70,280	
OTHER FUNDS** NONE				
PROJECT COST	\$82,040	\$11,760	\$70,280	

*Budgeted

**Contingency Funds, Grant, Etc.

RISK SCORE: 23.4

0 ----- 50 ----- 100
LOW RISK HIGH RISK

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EXECUTIVE SUMMARY
DES COST ACCOUNTING SYSTEM
SECTION 6

PURPOSE:

The feasibility study for DES Cost Accounting indicates no new system required at this time.

TOTAL PROJECT COST: \$0

RISK SCORE: None required

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**ATTACHMENT 2: PROJECTS TO BE FUNDED IN 1988-89
BY DEDICATED RESOURCES**

A&T ASSESSMENT AND COLLECTION SYSTEM

SHERIFF'S OFFICE ALARM ORDINANCE SYSTEM

SHERIFF'S OFFICE INMATE ACCOUNTING AND COMMISSARY SYSTEM



MULTNOMAH COUNTY OREGON

FEASIBILITY STUDY
FOR
A&T ASSESSMENT AND COLLECTION SYSTEM

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STATEMENT OF THE PROBLEM

The current automated system has evolved over the past 20 years. Fields and field sizes have been added or expanded as needed. If a field is no longer needed, it may be used as something entirely different than what it is called, causing confusion and errors.

The master file (Roll File) contains three years worth of assessment data. The assessor's section needs the third year available to them, before the tax collection department is finished with it. The result is usually a compromise unsatisfactory to either section.

The Roll File allows for one record per account, with six years of transaction history and five transactions per year. Foreclosure accounts now have a two-year redemption period. This means that until A&T can attach more than six receivable to any tax account, all accounts in foreclosure will have subaccounts. This is unacceptable for a variety of reasons, but primarily because it increases the changes that taxing districts will lose receivables under the bona fide purchaser statute.

Security to the files needs to be strengthened and a more sophisticated audit trail established:

The system does not provide a transaction audit trail to aid in determining who posted a transaction and when. There is no easy way of determining when a payment is actually received.

The assessor's tax role becomes official as of May 1st of a given year. Prior to that, assessors are working with the file establishing values for that next year. At any point prior to May 1st, values are not official and not public information. Currently anyone with access to the file can access the values giving potentially erroneous information. Security should be in place to prevent access without authorization until the values are official.

The current automated system does not edit for duplicate batch processing which has been a problem when applying tax payments. Occasionally batches will be duplicated. In order to restore the file integrity, expensive time-consuming procedures are followed causing delays to A&T's daily work. Records Appraisal and Collections data are so interrelated that problems in one area may impact other areas at critical reporting times.

Taxpayers call in for information about their accounts. The hard copy report A&T has to send is confusing and difficult to interpret. Often the report results in more questions than it answers.

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STATEMENT OF THE PROBLEM, cont'd.

The system has validation values stored in two tables, an online table and an offline table. Many times one table is updated while the other is not. In addition many validation values, such as transaction codes, are stored in the production programs. Whenever a change or additional transaction code is needed, the program must be changed, tested and recompiled.

The 'ATMENU' online system is inquire only. The system was written 10 years ago using 'state of the art' technology of the time. The programs have since reached maximum capacities of that technology. If information needs to be added to one of the programs, other data processes must be removed.

The system allows for no online updates. It can take up to six weeks for a name and/or address change.

There is no on-line name lookup capabilities. This would be an advantage for tax accounting.

The process used to set tax rates called "rate making" is cumbersome. The process needs to be enhanced by automating the urban renewal calculation and eliminating the unnecessary manual updating of the table file.

There are 19 files maintained and stored on the XL40 data entry equipment. All XL40 files should be on the mainframe where they can be maintained by ISD programmers and available for inquiry and file maintenance.

There are a relatively large number of tapes used in the system for file storage, backup, microfiche, printing and data entry. Many of these tapes are unnecessary. Retention of tapes should be reviewed based on legal requirements, ability to practically recover, and likelihood of later access to archived data.

Values can be generated for residential property using base replacement values available in tables. Assessors need to be able to generate values by calculating replacement costs for commercial and enhancements for income approach to value for commercial properties. If this was available to the assessors, they would be more accurate in setting values and would be better prepared to substantiate their values for appeals processing.

The A&T Data Dictionary is out of date.

Statistical data on the number of property values up or down for performance evaluation to determine how well appraisers are doing is not available.

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CURRENT SYSTEM DESCRIPTION

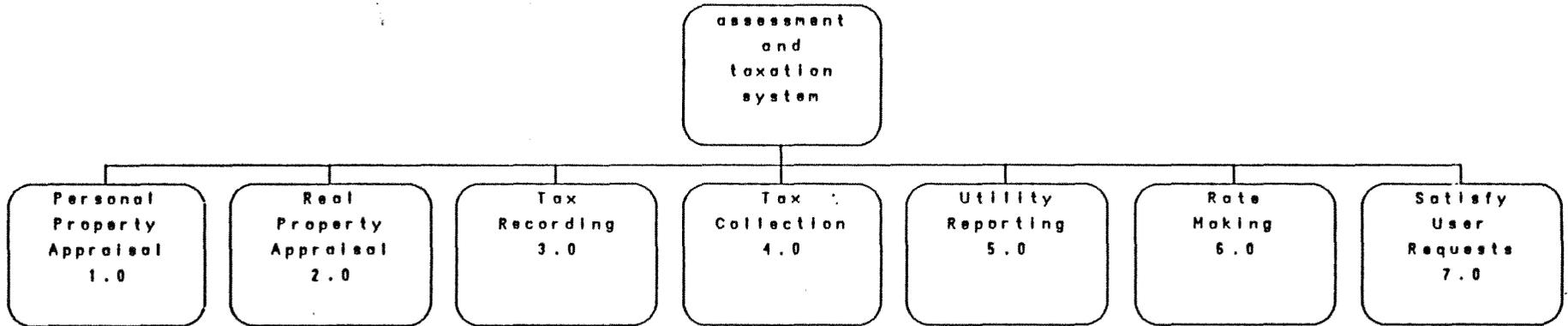
The Assessment and Taxation Automated System was originally developed 20+ years ago to run on what was then the County's mainframe computer. About 10 years ago maintenance for that computer was discontinued by the manufacturer. The A&T programs would not run on the County's (replacement) IBM computer, so conversion to another programming language was required. In order to install a new system on the new machine in a timely manner and with the highest possible change for success, the "new" system was designed to be a copy of the "old" system.

The original system was written to automate the Tax Collection function. Since then, the system has been modified to include other functions within A&T.

Today, A&T's automated system contains four main files: The Roll File, Property Address Index, sales and characteristics. The Roll File is the main file, containing 350,000 records with data about real, personal and Utility property. Each record can contain up to 2000 characters of information. There is only one record per account, therefore, each record contains ownership data, taxpayers data, legal, tax receivable, tax levied data, account status, market, exemption, deferral and characteristics data.

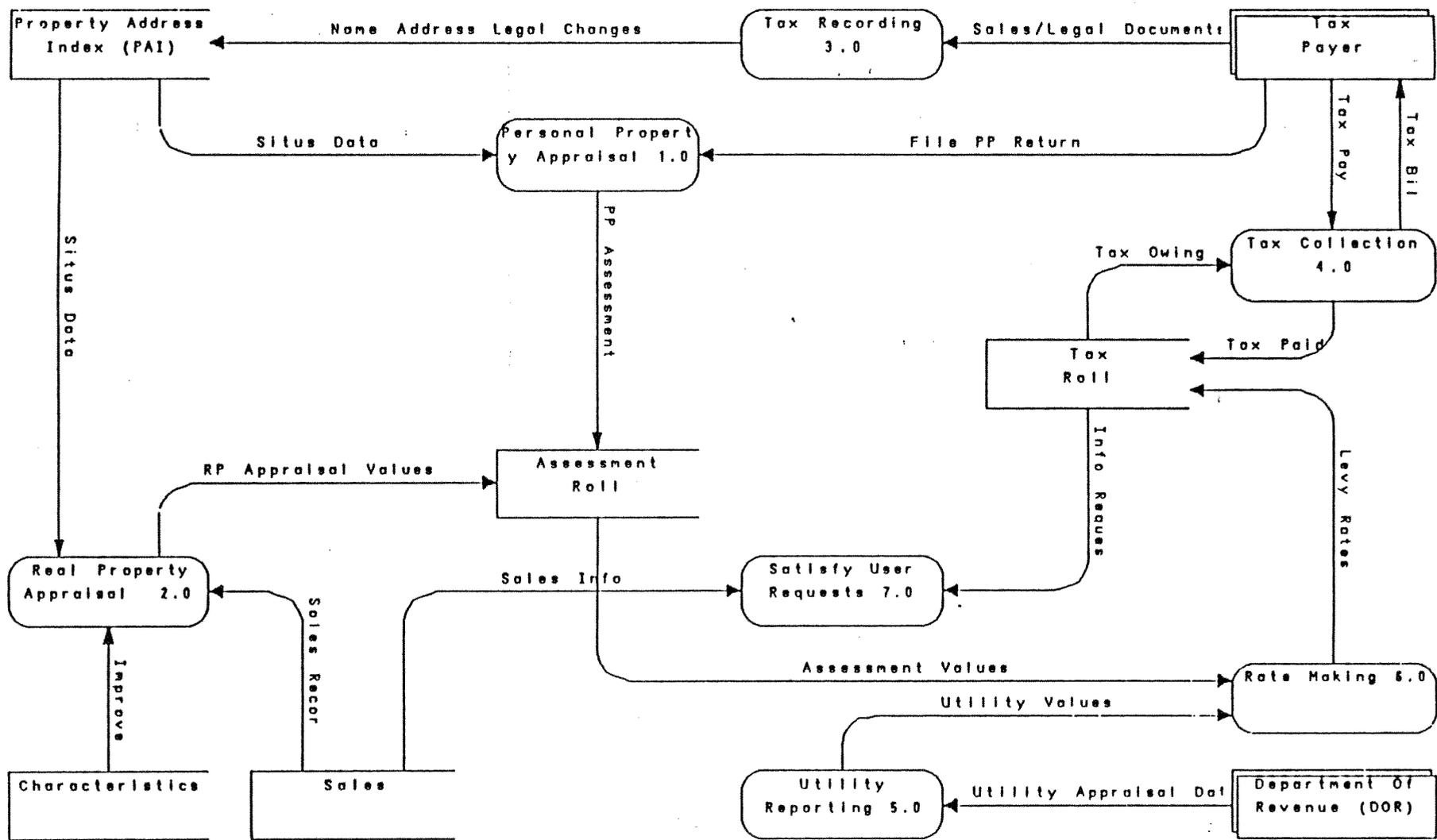
Data is collected into batches and entered into A&T's XL40 data entry equipment (which is also obsolete and unsupported by the vendor). From there the data is transmitted to the County mainframe for processing.

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assessment and taxation system

May 3, 1988 11:47:35



assessment and taxation system

May 3, 1988 11:48:13

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PROPOSED SYSTEM DESCRIPTION

SYSTEM NAME: A&T Appraisal, Assessment & Collection System

SYSTEM OWNER: Assessment and Taxation Division

OBJECTIVES: To enable the Assessment & Taxation division to comply with Oregon Statue in the Assessment and Tax Collection Sections in a cost effective and efficient manner.

BENEFITS: The benefits of an enhanced (or replacement) system for A&T include improved effectiveness of the automated system itself and providing the functionality required by A&T staff to perform their jobs more efficiently. Additionally, ongoing maintenance to a technically restructured system would be far less costly to the County; initial estimates indicate a 50% reduction in maintenance work could be achieved. A final consideration is the accuracy and extent of the information captured.

In order to insure these benefits are achieved, a system requirements definition using rapid analysis techniques will reduce the risk associated with the resulting system and result in reduced cost in terms of having to modify or redesign the system to get it right.

OTHER DEPARTMENTS AFFECTED: A&T's data is used by other departments in the County, City of Portland, City of Gresham, real estate companies, title companies, real estate developers and research companies.

OPERATING ENVIRONMENT: The system will run on the County's IBM compatible mainframe computer.

Approximately 100 terminals (IBM 3270 compatible) and an increasing number of dial-up PC's are attached to the County mainframe for the purpose of inquiring into A&T data files. Smaller machines could have hardware limitations restricting the number of terminals physically attached and may not have dial-up capabilities.

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PROPOSED SYSTEM DESCRIPTION, cont'd.

There are 350,000 records on A&T's main file (Roll File). Each record may contain up to 2000 characters. Although the record size and format of the file may change, overall file space will increase in the future. Smaller machines would not have the capacity to handle those file size requirements.

CONSTRAINTS: The system must not be implemented during a peak season, such as May, for the assessors, or November, February or May for tax collection.

CLIENTS INTERVIEWED: Input for this document has been collected from:

Wanda Wright
Eli Cohen
Jim Lynch
Bob Ellis
Jim Czmowski
Gary Ligi

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ALTERNATIVE SOLUTIONS

ALTERNATIVE #1: Do Nothing.

PRO: There have been many staff changes at A&T since the beginning of this year. If nothing is done, it will allow personnel to settle into new positions and become familiar with new personnel, responsibilities and processes.

CON: The current system is expensive to maintain. It takes three ISD personnel full time to maintain the automated system. If the system stays as it is, the structure may impact A&T's ability to stay in compliance with future statutory requirements. The ability to store additional years' worth of transactions is becoming essential. This change to the Roll File would be a major, expensive change to the automated system.

ALTERNATIVE #2: Do a requirements definition to decide which of the following solutions, or combination of solutions, is best:

- 1) Enhance the current system,
- 2) Do a major rewrite of the current system;
- 3) Purchase one or more tax system packages, which could do both the assessment and collection functions.

PRO: The current A&T Automated system has been modified and changed to satisfy whatever the "current" crisis or requirement may be. It has been many years since anyone has looked at what A&T's system requirements at the strategic level. A requirements definition would enable an intelligent, informed decision on which solution to implement.

CON: A requirements definition for A&T will take a time commitment from key personnel and require the expenditure of money.

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RECOMMENDED SOLUTIONS

ISD recommends Alternative #2. To do nothing will only put off the inevitable and leave A&T vulnerable to serious compliance problems. A requirements definition using rapid analysis techniques and CASE technology would document functions and data flows assisting A&T and ISD in determining the most beneficial and cost-effective solutions.

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PROJECT FUNDING REQUEST

SYSTEM NAME: A&T Appraisal, Assessment & Collection System

ISD RESOURCES:

Hardware No new computer hardware is anticipated.
Software No new software is anticipated.
Personnel Assigned to the project will be one full time senior systems analyst and one 3/4 time programmer/analyst. Some hours will be required of one senior system analyst and one programmer analyst who have input to the project on current system functions.
(\$48,144)

TOTAL ISD \$ 48,144

DEPARTMENT RESOURCES:

Personnel One full time project coordinator from A&T (\$26,138) plus key personnel from each section during their portion of the rapid analysis phase (\$64,770).

Materials & Services

One conference room needs to be available for 28 days during the rapid analysis phase of the project. Work space for the project team for two months is also required.

Capital

No additional capital is anticipated.

TOTAL DEPT \$ 90,908

DPMC RESOURCES:

Consultants
Analysts One full time and one part time (49,280).

Programmer/Analysts

Programmers

Other Materials & Services

No additional materials and services are anticipated.

Capital

No additional capital is anticipated.

TOTAL DPMC \$ 49,280

TOTAL PROJECT COSTS \$188,332

OTHER FUNDING SOURCES:

No other funds anticipated.

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PROJECT FUNDING REQUEST, cont'd.

OPPORTUNITIES DATA SHARING: City of Portland
 City of Gresham
 Title Companies
 Real Estate Companies
 Real Estate Developers

PROJECT BENEFITS:
 Cost Displacement The benefits of an enhanced (or replacement)
 Cost Avoidance system for A&T include improved effectiveness
 Value Added of the automated system itself and providing
 the functionality required by A&T staff to
 perform their jobs more efficiently.
 Additionally, ongoing maintenance to a
 technically restructured system would be far
 less costly to the County; initial estimates
 indicate a 50% reduction in maintenance work
 could be achieved. A final consideration is
 the accuracy and extent of the information
 captured.

In order to insure these benefits are achieved, a system requirements definition using Rapid Analysis techniques will reduce risk associated with the resulting system and result in reduced cost in terms of having to modify or redesign the system to get it right.

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EXECUTIVE SUMMARY

SHERIFF'S OFFICE ALARM ORDINANCE SYSTEM

PURPOSE:

This system will replace an existing manual system. This is not a request for funding. The dollars needed for the equipment and for developing the system have already been budgeted within the Sheriff's Office for 1988-89.

TOTAL ISD	\$	0
TOTAL DEPT	\$	40,853
TOTAL DPMD	\$	0
TOTAL PROJECT COST:	\$	40,853

Project completion is projected for November 1988.

CURRENT SYSTEM DESCRIPTION

The Alarm Ordinance Unit is the unit which issues alarm permits to the residences and businesses of Multnomah County. Every residence and business within the County is required by the County Ordinance to register their alarm with this Unit. The purpose of this Ordinance was to reduce false alarms, permit faster dispatching time for police officers, and provide a data base to ensure more effective police response.

Once an alarm permit is issued, and the fee paid, the information pertaining to that permit is entered into the Bureau of Emergency Communications (BOEC) computer by Alarm Ordinance personnel. The type of information entered into BOEC'S computer includes: name, phone number, street address where alarm is installed, whether it is a residence or business, the permit number, type of alarm, name of alarm company, phone number, emergency contact, etc.

The Alarm Permit information is accessed by the dispatchers at BOEC and thus police officers can be more readily dispatched to the address where the alarm has been set-off. All incidents are coded. If the officer finds that the alarm was false, a false alarm code is noted for that incident.

Every week the Alarm Ordinance personnel pick-up a hardcopy printout of the alarms which have been activated. All false alarms are noted. A letter is sent notifying the permit holder of the false alarm. Four false alarms are allowed per year. After the fifth false alarm, the permit is revoked and a \$40.00 fine is imposed and must be paid if the permit holder wants to continue using that alarm.

Except for the computerized Alarm file at BOEC, and the notification letters which are on the word processing system at the Hansen Building, all other functions of the Alarm Ordinance Unit are manual and handled via paper files.

STATEMENT OF THE PROBLEM

All permit renewals, false alarm notifications, fees paid, information pertaining to the permit holder are in files. To obtain any management information, the files must be reviewed and the information extracted by hand.

The original intent of the Alarm Ordinance was to decrease false alarms, dispatch police officers more readily and provide a data base to ensure more effective police response.

The Alarm Ordinance Unit needs an automated system which will ensure more timely notification of false alarm permit holders and the capability to generate management information reports to management, the police agencies, and alarm companies.

PROPOSED SYSTEM DESCRIPTION

SYSTEM NAME: Alarm Ordinance System (AOS)

SYSTEM OWNER: Sheriff's Office

OBJECTIVES: To develop a computerized system which will automate the functions of the Alarm Ordinance Unit.

To ultimately be able to enter all alarm information online to the BOEC computer (Until the new BOEC system is available, the data will be downloaded and uploaded via tape.)

BENEFITS: The system would enhance the reporting and notification of false alarm permit holders and could be of benefit in reducing the false alarm rate. Management information generated from the system would help meet the current and planned operational and management information needs of the Sheriff's Office, police agencies, and other Criminal Justice agencies.

OTHER DEPARTMENTS AFFECTED: BOEC and Portland Police Bureau

OPERATING ENVIRONMENT: The system will run on the County's IBM-compatible mainframe computer.

CONSTRAINTS: None

EXECUTIVE SUMMARY

SHERIFF'S OFFICE INMATE ACCOUNTING AND COMMISSARY SYSTEM

PURPOSE:

This system will replace an existing manual system. This is not a request for funding. The dollars needed for the equipment and for developing the system have already been budgeted within the Sheriff's Office for 1988-89.

TOTAL ISD	\$	0
TOTAL DEPT	\$	81,022 *
TOTAL IFMC	\$	0
TOTAL PROJECT COST:	\$	81,022

Project completion is projected for January 1989.

* Inmate Trust share = \$20,255 or 25% of the total amount

CURRENT SYSTEM DESCRIPTION

Jail management includes not only booking and housing inmates, but also the responsible handling and accounting of any and all inmate funds. At the present time, the majority of all transactions involving inmate accounts is done manually.

The Inmate Accounting/Commissary Unit is responsible for creating an account when an inmate is booked into the Multnomah County Detention Center (MCDC). Cash from the inmate is credited to his account. A relative or friend may also send or deliver cash or a money order to the MCDC. This amount is also credited to the inmate's account. The balance remaining in an inmate's account is paid to the inmate upon his release.

An inmate can draw against the balance in his account to purchase items from the Commissary. The cost of any Commissary items an inmate wishes to purchase is deducted from the inmate's account.

A separate interest bearing checking account is maintained in a local bank. This account accrues interest which is credited to an Inmate Welfare Trust Account. This interest is used to purchase items which will be of benefit to or used by the inmates while they are housed in one of the County jail facilities. Any profits from Commissary sales also go into the Inmate Welfare Trust Account.

During the period of time the inmate is housed in one of the County jail facilities, the Sheriff's Office is responsible for the correct accounting of the inmate's funds. Since approximately 25,000 inmates are booked per year, the responsibility of managing and properly accounting for inmate funds is immense.

STATEMENT OF THE PROBLEM

As stated above, the majority of all transactions involving inmate accounts is done manually. A County Audit report in 1983 recommended that the inmate accounting procedures needed to be automated. The monthly reconciliation of inmate accounts is currently being done on a macrocomputer, but the posting of accounts, and all other monetary transactions involving inmate funds is still being done manually.

The manual process of filling inmates' Commissary orders, checking the items off the list, and continually updating the Commissary inventory necessitates a large number of manhours being expended in the detailed tracking of items which a computer system could manage more efficiently.

PROPOSED SYSTEM DESCRIPTION

SYSTEM NAME: Inmate Accounting and Commissary System (IACS)

SYSTEM OWNER: Sheriff's Office

OBJECTIVES: To develop a computerized system which will automate the functions of the Inmate Accounting and Commissary Unit.

The automated system would maintain computerized accounts for all inmates; generate data for the reconciliation of inmate accounts; and keep track of and inventory all Commissary items.

BENEFITS: The system would enhance the the Unit's capability in accounting for the inmates' money and maintaining the Inmate Welfare Trust Account. Inmate transactions could be handled in a more timely manner and an inmate's account could be reactivated if he is re-booked into the MCDC. A new account would not have to be created.

The inventory portion would enhance the Unit's ability to track and order the Commissary items required by the inmates.

OTHER DEPARTMENTS AFFECTED: None

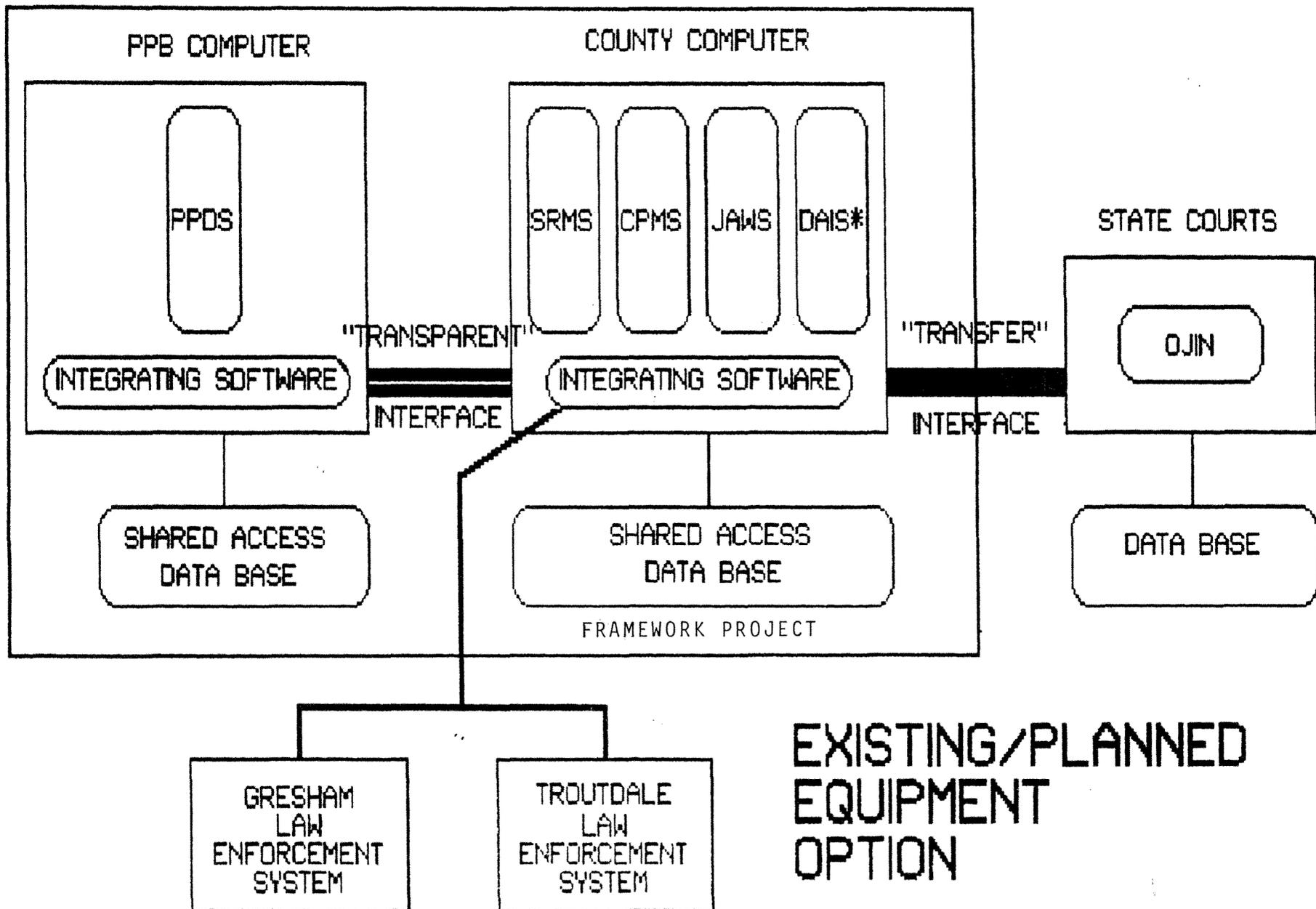
OPERATING ENVIRONMENT: The system will run on the County's IBM-compatible mainframe computer. The IACS will interface with the Sheriff's Office Corrections Population Management System (CPMS) and the County's Walker Interactive Products System (inventory system).

CONSTRAINTS: None

ATTACHMENT 3:
INTEGRATED CRIMINAL JUSTICE INFORMATION SYSTEM INTEGRATION

ICJIS CONCEPT
FRAMEWORK SYSTEM DESCRIPTION

INTEGRATED SYSTEM



EXISTING/PLANNED
EQUIPMENT
OPTION

* DAIS = NEW DA INFORMATION SYSTEM

FIGURE 6

ICJIS FRAMEWORK PROJECT

In January, 1988 a plan for the development of an integrated criminal justice information system (ICJIS) was delivered to the Board of County Commissioners. The plan defined the concept of an integrated system in terms of both functionality and data sharing and identified several options by which an integrated system could be achieved. The plan concluded with recommendations that suggested development of an integrated criminal justice information system using existing and planned systems as a foundation for the integrated system.

The primary and essential first step in building an integrated criminal justice information system is the development of a standard data architecture which allows the sharing and common use of information between application systems. The development approach recommended in the ICJIS plan also identified existing automated systems in the Sheriff's Office which would require extensive modification and enhancement in order to build a foundation for integration. Interfacing with external criminal justice agencies and replacing the DA's information system were identified as additional steps necessary to achieve integration.

The Data Processing Management Committee recommended that two criminal justice related projects proceed concurrently in fiscal year 1988/89. The Framework project will develop the integrating architecture identified in the ICJIS plan. The other project will rewrite and integrate the applications in the Sheriff's Office in concert with the standards and architecture defined in the Framework project.

The product of the Framework project will include:

- a definition of the data elements needed to support criminal justice agency operational needs and management information in a uniform, standard format
- an analysis and definition of data relationships between all required criminal justice agencies including those external to the County
- a standard data architecture and structure for all county criminal justice agencies.

The Framework project will provide a set of standards and establish common data architecture for the development of all criminal justice systems. The standards and architecture that result will ensure that data is stored and made available to support operational and management reporting needs. This will enhance information sharing between application systems and greatly reduce data duplication and redundancy.

As the first step towards an integrated criminal justice information system the Framework project will be directly supervised by the County's Data Administrator with direction provided by the Director of Justice Services. This project is scheduled to coincide with the first phase of the Sheriff's Office project and will include participation from Justice Services, the Sheriff's Office and the District Attorney's Office. The project will begin as soon as possible and is expected to take four months with an estimated project cost of \$51,000.

DATE SUBMITTED July 14, 1988

Informed

*Cancelled
to be rescheduled*

(For Clerk's Use)
Meeting Date 7/19/88
Agenda No. #3

REQUEST FOR PLACEMENT ON THE AGENDA

Jry

Subject: Urban Services Briefing

Informal Only* July 19, 1988
(Date)

Formal Only _____
(Date)

DEPARTMENT Chair DIVISION _____

CONTACT Grant Nelson TELEPHONE 248 3308

*NAME(s) OF PERSON MAKING PRESENTATION TO BOARD Susan McPherson, Urban Services Mngr-Portland

BRIEF SUMMARY Should include other alternatives explored, if applicable, and clear statement of rationale for the action requested.

Portland's Urban Services Manager has been invited to brief the BCC on Portland's plans for annexation during FY 1988-89. She will also relate how the \$60,000 requested of the County will be spent by the City during the coming year. Areas to be annexed and methods of annexation used will be discussed as well as ways in which Multnomah County can be of assistance in helping unincorporated county residents obtain adequate levels of urban services.

(IF ADDITIONAL SPACE IS NEEDED, PLEASE USE REVERSE SIDE)

ACTION REQUESTED:

- INFORMATION ONLY
- PRELIMINARY APPROVAL
- POLICY DIRECTION
- APPROVAL

INDICATE THE ESTIMATED TIME NEEDED ON AGENDA 20-30 minutes

IMPACT:

- PERSONNEL
- FISCAL/BUDGETARY
 - General Fund
 - Other _____

BOARD OF COUNTY COMMISSIONERS
MULTNOMAH COUNTY
OREGON
1988 JUL 14 AM 10:23

SIGNATURES:

DEPARTMENT HEAD, ELECTED OFFICIAL, or COUNTY COMMISSIONER: *[Signature]*

BUDGET / PERSONNEL _____

COUNTY COUNSEL (Ordinances, Resolutions, Agreements, Contracts) _____

OTHER _____
(Purchasing, Facilities Management, etc.)

NOTE: If requesting unanimous consent, state situation requiring emergency action on back.