

RESOLUTION NO. 339

WHEREAS, the Fire and Police Disability and Retirement Fund (Fund) is in need of an upgrade in its computer systems design and programming services; and

WHEREAS, the Fund has completed a competitive bid and selection process; and

WHEREAS, Data Management Consultants (DMC) is engaged in the business of providing systems design and programming services; and

WHEREAS, the Fund staff recommended the selection of DMC for its system upgrade; and

WHEREAS, a copy of an Agreement between the Fund and DMC is attached as Exhibit "A" and by this reference made a part hereof; and

WHEREAS, the Board of Trustees of the Fund previously approved the need for development and implementation of its system improvements.

NOW, THEREFORE, BE IT RESOLVED by the Board of Trustees of the Fire and Police Disability and Retirement Fund, that the Fund Administrator be and hereby is authorized to execute, on behalf of the Board, an Agreement substantially in accordance with the form of Agreement attached hereto as Exhibit "A".

ADOPTED by the Board of Trustees on the 11th day of Dec., 2001.

Babette Heefle

Babette Heefle
Fund Administrator

any modifications to the Detailed Specifications that are necessary to achieve the Improvement and comply with the Profile. Contractor will submit to Fund any modifications made to the Detailed Specifications and Fund will have seven (7) working days to inform Contractor if the modification does not comply with the Profile. This process will continue until the Detailed Specifications comply with the Profile. If Fund does not respond in writing by the Response Date or within seven (7) working days of receipt of any modifications to the Detailed Specifications, Fund will be deemed to have accepted the Detailed Specifications unless Fund has requested, in writing to Contractor, an extension of the seven (7) day period.

Upon acceptance of the Detailed Specifications, Contractor will present a schedule of hours, fees and completion date for the Software Development, Training and Implementation of the Improvement. The schedule of hours, fees and completion date will be approved in writing by Fund prior to further development work by Contractor. Once the schedule of hours, fees and completion date are approved by Fund for the Improvement, there will be no changes by either party to the scope, fees or completion date for the Software Development, Training and Implementation of the Improvement without the execution of a Change Order, as defined below.

(b) Software Development.

Contractor will design and develop software to implement each Improvement according to the Detailed Specifications.

(c) Acceptance Testing.

Contractor will make the software for each Improvement available to Fund through a test system prior to final delivery. Contractor will train testing staff, if necessary, prior to each test commencing. The Test System will consist of a separate directory located on the appropriate machine with representative data and current programs for the purpose of testing Improvements and Development while being isolated from the live system. Contractor will inform Fund in writing that the Improvement is available for testing (the "Testing Notice"). Fund will have ten (10) working days from the Testing Notice to evaluate the Improvement and determine whether the Improvement performs and functions according to the Detailed Specifications. Fund will report any deficiencies in the Improvement to Contractor. Upon confirming a deficiency does exist, Contractor will make any corrections to the Improvement. If Fund does not notify Contractor of a deficiency within ten (10) working days of the Testing Notice, Fund will be deemed to have accepted the Improvement ("Acceptance") unless Fund has requested, in writing to Contractor, an extension of the ten (10) working day period.

(d) Training and Documentation.

Upon Acceptance, Contractor will deliver the Documentation to Fund. Documentation means the converted databases, if applicable to that Improvement, source code and any other appropriate material as determined by Contractor.

Upon Acceptance, Contractor will conduct training for that Improvement at Fund's facility, if training is included in the Project Appendix for that Improvement. The training will educate employees, selected by Fund, in the operation of the Improvement. Fund will provide Contractor with reasonable resources for facilitating the training.

Contractor is not obligated to provide maintenance for any modifications to the Improvements or Documentation performed by Fund or under Fund's direction.

In the event Fund wishes to obtain from Contractor additional services with respect to the Improvements, Contractor agrees to negotiate in good faith for the provision of those services.

2. CONFIDENTIALITY

Because Contractor will have access to confidential information regarding Fund Members ("Personal Member Information"), Contractor will not disclose or in any way communicate any Personal Member Information it may observe or receive except to those employees who have a need to know.

Because Fund and Contractor may receive Confidential Information in the process of performing this Agreement, Fund and Contractor will not disclose Confidential Information of the other party to any third party or any employee not authorized to receive the Confidential Information. Confidential Information includes all proprietary information of each party including, without limitation, (a) trade secrets, inventions, products, ideas, processes, formulas, source code, data, software, programs, other works of authorship, know-how, improvements, discoveries, developments, engineering, hardware configuration information, designs and techniques; (b) information regarding plans for research, development, new products, marketing and selling, business plans, budgets and unpublished financial statements, licenses, prices and costs, suppliers and customers; and (c) information regarding the skills and compensation of employees or independent contractors of each party

3. SCOPE OF FUND SERVICES AND FUND RESPONSIBILITIES

Fund will make available sufficient hours of staff personnel as is required to meet with Contractor and provide information. The Project Manager will oversee the work and provide support as needed. Fund will furnish and make available its equipment and facilities required for development, testing, training, installation, operation, and maintenance of the Improvements.

(a) Operating Environment.

At Fund's expense, Fund will obtain the hardware and software identified in Exhibit A1. Contractor will perform installation and set up of hardware and software as described in Exhibit A2 prior to Implementation of any Improvement. Fund assumes full responsibility for the overall effectiveness and efficiency of the operating environment in which the Improvements are to function, including, but not limited to, maintaining heating, ventilation, air conditioning, and electrical power in accordance with Contractor's specifications and those of the manufacturer of any hardware with which the programs are used. Fund acknowledges that the Improvements will be developed using VFP as the primary development tool, which requires Microsoft Win2000 Terminal Server as the operating system.

(b) Access to Premises.

Fund will grant Contractor access to Fund's premises, facilities and equipment via a high speed connection through terminal access and such other access as Contractor may deem necessary to perform its obligations under this Agreement and ensure the enforcement of the provisions of this Agreement.

(d) Upon breach of this Agreement by Fund for failure to pay invoices, Contractor may terminate this Agreement and take possession of all Improvements delivered to Fund for which Fund has not submitted payment.

(e) Upon breach of the Confidentiality provisions of this Agreement, the nonbreaching party may immediately terminate this Agreement and is entitled to equitable relief including orders for specific performance and injunctions, as well as monetary damages.

7. FUND PROJECT MANAGER

(a) Fund assigns Candace Walter, or such other person as the Administrator of Fund will designate in writing to Contractor, as Project Manager.

(b) The Project Manager is authorized by Fund to act as its representative and to approve work and fees, to give notices, to terminate this Agreement, and to carry out any other Fund actions.

8. COMPLIANCE WITH LAWS

(a) In connection with its activities under this Agreement, Contractor will comply with all applicable federal, state and local laws and regulations.

(b) In the event Contractor provides goods and services to Fund that in the aggregate exceed \$2,500.00 per fiscal year, Contractor will promptly commence and diligently pursue certification through the City's Equal Employment Opportunity certification process.

9. OREGON LAW AND FORUM

(a) This Agreement will be construed according to the laws of the State of Oregon.

(b) Any litigation between Fund and Contractor arising under this Agreement or out of work performed under this Agreement will occur in the state or federal courts located in Multnomah County, Oregon.

10. INDEMNIFICATION

(a) Contractor will hold harmless, defend and indemnify for public liability, property damage or professional liability Fund and Fund's officers, agents and employees against all claims, demands, actions and suits (including reasonable attorney fees and costs) brought against any of them arising out of Contractor's negligent acts or omissions or any subcontractor's negligent acts or omissions under this Agreement. Fund will give prompt written notice of any claims, demands, actions and suits that may give rise to a claim of indemnification within twenty (20) days of learning of or obtaining knowledge of the claims, demands, actions and suits. Failure to give prompt written notice will relieve Contractor of its indemnification obligation.

(b) If Contractor's services involve engineering or consulting, the standard of care applicable to Contractor's service will be the degree of skill and diligence normally employed by professional engineers or consultants performing the same or similar services at the time the services are performed. Contractor will re-perform any services not meeting this standard without additional compensation.

13. ASSIGNMENT

Contractor will not assign this Agreement, in whole or in part, or any right or obligation under this Agreement, without prior written approval of Fund.

14. INDEPENDENT CONTRACTOR STATUS

(a) Contractor is engaged as an independent contractor and will be responsible for any federal, state, and local taxes and fees applicable to payments made under this Agreement.

(b) Contractor, its subcontractors and their employees are not employees of Fund and are not eligible for any benefits through Fund, including without limitation, federal social security, health benefits, workers' compensation, unemployment compensation, and retirement benefits.

15. OWNERSHIP OF IMPROVEMENTS/DOCUMENTATION/WORK PRODUCT

Contractor grants Fund the rights, to the extent Contractor can grant these rights, to use the Improvements and Documentation for Fund's internal use. Contractor will provide Fund source code of the application software prior to the Acceptance Testing during each project phase. Contractor grants Fund ownership rights to the application software developed for Fund to be used for Fund's internal use only and not for publication or resale by the Fund. Fund grants Contractor the irrevocable rights to use, reproduce, distribute, develop derivative works of application software developed for Fund. The Fund shall own any and all data, documents, plans, specifications, working papers, and any other materials the Contractor produces in connection with this Agreement. On completion or termination of the Agreement, the Contractor shall deliver these materials, as requested, to the Project Manager.

16. NOTICE

Any notice provided for under this Agreement will be sufficient if in writing and delivered personally to the following address or email address with reply required or deposited in the United States mail, postage prepaid, certified mail, return receipt requested, addressed as follows, or to such other address as the receiving party specifies in writing:

If to Fund:

Candace Walter, Special Projects Manager
Fire & Police Disability & Retirement Fund
1800 S.W. First Avenue, Suite 450
Portland, Oregon 97201
cwalter@ci.portland.or.us

If to Contractor:

Rick Gustafson
Data Management Consultants
10445 SW Canyon Road, Suite 266
Beaverton, Oregon 97005
rick@dmcwest.com

17. SEVERABILITY

Each provision of this Agreement will be treated as a separate and independent clause, and the unenforceability of any one clause will in no way impair the enforceability of any of the other clauses in this Agreement. If one or more of the provisions contained in this Agreement is, for any reason, held to

Overpayment by notifying Fund of its objection within thirty (30) days of receiving the notification of the Overpayment.

(c) If an audit discloses that payment to Contractor was less than the amount to which Contractor was entitled, Fund will pay the amount of the deficit to Contractor within thirty (30) days of notice of the deficient payment.

24. LIABILITY INSURANCE

Contractor will maintain public liability and property damage insurance that protects Contractor and Fund and Fund's officers, agents and employees from any and all claims, demands, actions and suits for damages to property or personal injury, including death, arising from Contractor's work under this Agreement. The insurance will provide coverage for not less than \$200,000 for personal injury to each person, \$500,000 for each occurrence, and \$500,000 for each occurrence involving property damage; or a single limit policy of not less than \$500,000 covering all claims per occurrence. The insurance will be without prejudice to coverage otherwise existing and will name as additional insureds Fund and its officers, agents and employees. The insurance will protect each insured in the same manner as though a separate policy had been issued to each, but nothing in this Agreement will operate to increase the insurer's liability as set forth elsewhere in the policy beyond the amount or amounts for which the insurer would have been liable if only one person or interest had been named as insured. The coverage, if obtained, must apply as to claims between insureds on the policy and for any damages or injuries arising out of the use of automobiles or other motor vehicles by Contractor.

25. BREACH OF AGREEMENT

(a) Fund or Contractor will breach this Agreement if it fails to perform any substantial obligation under the Agreement, except as provided in subsection (b) of this section.

(b) Neither Fund nor Contractor will breach this Agreement by reason of any failure to perform a substantial obligation under the Agreement if the failure arises out of causes beyond its control and without its fault or negligence. The causes may include, without limitation, acts of God or the public enemy, acts of the federal, state or local governments, fires, floods, epidemics, volcanic eruptions, quarantine restrictions, strikes, freight embargoes and unusually severe weather. Should either Fund or Contractor fail to perform because of a cause described in this subsection, Fund and Contractor will make a mutually acceptable revision to the scope of the services, compensation and other necessary provisions.

26. ARBITRATION

(a) Any dispute arising out of or in connection with this Agreement, which is not settled by mutual agreement of Contractor and Fund within sixty (60) days of notification in writing by either party, will be submitted to an arbitrator mutually agreed upon by the parties. In the event the parties cannot agree on the arbitrator, then the arbitrator will be appointed by the Presiding Judge (Civil) of the Circuit Court of the State of Oregon for the County of Multnomah. The arbitration, and any litigation arising out of or in connection with this Agreement, will be conducted in Portland, Oregon, will be governed by the laws of the State of Oregon, and will be as speedy as reasonably possible. The applicable arbitration rules for the Multnomah County Courts will apply unless the parties agree in writing to other rules.

(b) Contractor will continue to perform its work pending resolution of the dispute, and Fund will make payments as required by the Agreement.

EXHIBIT A1**LIST OF CURRENT HARDWARE AND SOFTWARE****FUND IS RESPONSIBLE FOR OBTAINING**

<u>HARDWARE DESCRIPTION</u>	<u>DELL PART #</u>
DELL POWEREDGE 2500 1.26GHZ	220-7586
2 ND PROCESSOR 1.26 GHZ	311-1267
512K CACHE	
2GB SDRAM, 133MHZ, 4X512MB DIMMs	311-6574
STANDARD WINDOWS KEYBOARD	310-4100
DELL MONITOR P780, 17"	320-0091
18GB, U160M, SCSI, 1 in, 10K HD	340-1937
18GB, U160M, SCSI, 1 in, 10K HD	340-1937
3.5", 1.44MB FLOPPY DRIVE	340-2557
WINDOWS 2000 SERVER, 5 CLIENT	310-1261
LICENSES, 4GB UTILITY PARTITION	420-0236
MICROSOFT SYSTEM MOUSE	310-3777
PV100T, DDS4, 20/40G, INTERNAL TAPE	340-2560
24X, IDE CD-ROM	313-8993
1X6 HOT-PLUGGABLE HHD BACKPLANE	311-6578
USER'S AND TROUBLESHOOTING GUIDE	310-0840
FOR POWEREDGE 2500	
VERITAS SERVER TAPE SOFTWARE	420-2833
TOWER CHASSIS	310-0841
3YRS BRONZE SUPPORT, NEXT BUSINESS	900-8550
DAY ONSITE	900-8552
REDUNDANT POWER SUPPLY 2+1	310-5086
DELL POWERCONNECT 3024, MANAGED SWITCH,	220-2108
24 PORT, 10/100 FAST ETHERNET, 2 PORTS	
3YRS SAME DAY, 4 HR RESPONSE PARTS	950-1642
DELIVERY, (7 DAYSX24HOURS)	950-1640

<u>SOFTWARE DESCRIPTION</u>	<u>MANUFACTURE'S PART NUMBER</u>
MICROSOFT WINDOWS 2000 SERVER	(3) C78-00001
15 ADDITIONAL CLIENTS	
MICROSOFT WINDOWS 2000 SERVER	C79-00002
TERMINAL SERVICES - 20 CLIENTS	
MICROSOFT VISUAL FOXPRO 7.0	340-01071
PROFESSIONAL EDITION	
FOXFIRE! - VER. 6.0	FFSTDDEV
DEVELOPER STANDARD EDITION	
VFP DEVELOPMENT BASE CLASS	DMC-0012

EXHIBIT A3**TECHNOLOGY MAINTENANCE & SUPPORT AGREEMENT**

Contractor will provide up to ten (10) hours of technology maintenance and support per month to Fund, including access to Contractor's software "Hot Line" support, in consideration of Fund's payment to Contractor of \$1,000 per month. Fund agrees to pay Contractor for all hours in excess of ten (10) hours per month at Contractor's hourly rate stated below.

Contractor's Professional Service Hourly rate is \$100 PER HOUR DURING NORMAL BUSINESS HOURS, defined as 8:00 A.M. to 5:00 P.M. Pacific Time weekdays, excluding Contractor's published Holidays.

Contractor's Professional Service Hourly rate is \$200 PER HOUR FOR ALL NON NORMAL BUSINESS HOURS (Nights, Weekends, Holidays, Etc.).

Contractor's Monthly Technology and Support Maintenance charge allows Fund's Designated Employees to call Contractor's "Hot Line" support as often as required between the hours of 8:00 A.M. to 5:00 P.M. Pacific Time during Contractor's Normal Business Hours to request Support for the following Software Modules:

SOFTWARE SUPPORT MODULES

DISABILITY/EXPEDITING SYSTEM

PENSION SYSTEM

FOXFIRE SOFTWARE

MICROSOFT VISUAL FOXPRO VER. 7.0

MICROSOFT WINDOWS 2000 SERVER

MICROSOFT WINDOWS 2000 TERMINAL SERVER

VERITAS BACKUP EXEC VER. 8.6

VFP DEVELOPMENT BASE CLASS

MS WINDOWS DESKTOP OPERATING SYSTEMS

EXHIBIT C

INSURANCE (The Project Manager must answer and initial 2, 3, and 4 below).

During the term of this contract Contractor shall maintain in force at its own expense, each insurance noted below:

1. Workers Compensation insurance in compliance with ORS 656.017, which requires subject employers to provide Oregon workers' compensation coverage for all their subject workers (contractors with one or more employees, unless exempt under ORS 656.027).

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2. _____ Required and attached or Waived by City Attorney : _____

General Liability insurance with a combined single limit of not less than \$500,000 each occurrence for Bodily Injury and Property Damage. It shall include contractual liability coverage for the indemnity provided under this contract, and shall provide that City of Portland, and its agents, officers, and employees are Additional Insured but only with respect to the Contractor's services to be provided under this Contract:

3. _____ Required and attached or Waived by City Attorney : _____

Automobile Liability insurance with a combined single limit of not less than \$500,000 each occurrence for Bodily Injury and Property Damage, including coverage for owned, hired, or nonowned vehicles, as applicable:

4. _____ Required and attached or Waived by City Attorney : _____

Professional Liability insurance with a combined single limit of not less than \$1,000,000 each claim, incident, or occurrence. This is to cover damages caused by error, omission or negligent acts related to the professional services to be provided under this contract.

5. On all types of insurance. There shall be no cancellation, material change, reduction of limits, or intent not to renew the insurance coverage(s) without 30-days written notice from the Contractor or its insurer(s) to the City.
6. Certificates of insurance. As evidence of the insurance coverages required by this contract, the Contractor shall furnish acceptable insurance certificates to the City at the time contractor returns signed contracts. The certificate will specify all of the parties who are Additional Insured and will include the 30-day cancellation clause that provides that the insurance shall not terminate or be cancelled without 30 days written notice first being given to the City Auditor. Insuring companies or entities are subject to City acceptance. If requested, complete policy copies shall be provided to the City. The Contractor shall be financially responsible for all pertinent deductibles, self-insured retentions, and/or self-insurance.

PROJECT APPENDIX B

Phase Two

Contractor will begin work on the Improvements in Phase Two upon Implementation of all Phase One services.

Improvement: Incorporate Claim Based Structure to Database. The database will need to be modified to make the claim number a primary index field to most major files. Various screens will need to be modified to support this database change and allow multiple open claims per member by pay period. The database will need to be designed to not allow duplication of claim numbers. The injury screen will default to claim number order with the active claim listed first.

Profile:

- Allow for multiple open claims per member
- All transactions (time loss, medical, member, member reimbursement, notes, etc.) would be recorded under the proper claim number
- Allow for lookup by claim number
- Injury screens should default to claim number order (active claim first)
- Disallow reuse of claim numbers

VFP (Hours)

System Design	4
Development	10 - 30
Implementation	2 - 4

Improvement: Develop Electronic Integration of TARS/EPAN for TL Claims. A process will need to be developed to import a TL file and match the data to the database and produce detailed and exceptions reports as needed. The user will need a screen to edit the file and post the file once the editing is completed.

Profile:

Generation of TL to be paid (to be set-up by BIT):

- Generate a file of all fire and police members who have any no-pay DOE and "injury" comment in any TAR transaction
- Key information: TAR date, employee number, hours, and rate of pay
- Rate of pay computed similar to rate computed for regular hours worked, including longevity pay

Import to Foxpro system:

- Capture TL file generated above
- Generate list of all transactions of the file

- When reviewing history on a claim, allow for viewing all notes history in addition to other transactions

Tickler:

- Allow any person to enter a management plan for a claim: activities that are necessary, person responsible for the activity, status (e.g., planned, completed), target dates (e.g., review physician chart notes on mm/dd/yy; complete claim review on mm/dd/yy)
- Allow any person to view all of their pending follow-up activities based on an entry of a date range and/or selected claims
- Allow for printing planned activities, sorted by person, follow up date, and claim
- Generate reminders (queries and/or reports) for planned activity that are past due
- "Tickler" actions that should be generated automatically by person responsible for managing claim:
 - member on TL disability for 5 months
 - member on TL disability for 9 months
 - member on TL disability for one month before eligible retirement age
 - pending status of claim every 30 days
 - continuously off work for 4 years
 - one year after moved to monthly
 - 2 months prior to disabled members reaching 30 years of service (New Plan), reaching 64th birthday (Old Plan) or their children turning 18
- Supervisors report: request above "tickler" reports for all claims

VFP (Hours)

Diary

System Design 3

Notes per file 3

Assuming 3 files

Implementation 2

Tickler

System Design 6

Screens 15 - 30

Reports 8 - 12

Outlook Interface 12 - 24

Implementation 2 - 4

Training 2 - 4

Improvement: Implement Mail Merge Letters. Processes will need to be developed to select and export the database files for batch processing of letters. A database screen will be developed to allow the user to select a member or vendor and a letter type to merge with that record. A history file of letters sent by member or vendor will be updated by the process.

Profile:

- Export mail merge files (Word) for the following correspondence:

- Generate complete info (time, name of member, meeting date, voided amount) on reports
- Allow multiple destinations for direct deposits

VFP (Hours)

System Design	10
Development	
Database/Screens	30 - 60
Reports	20 - 40
1099's and Media	10 - 20
Checks/Stubs/Direct Deposit	6 - 16
Implementation	2 - 4
Training	4 - 8

Improvement: Pension Estimate. This process requires taking the formulas from a current spread sheet and incorporating them into the system in a data entry screen process used to produce an estimated pension form.

Profile:

Functionality from Payroll system:

- Provide an inquiry screen to entry of member employee number and potential retirement date
- Calculate monthly Base pay to be used for basis of pension:
 - Base pay for the 12 months prior to the potential retirement date, considering all regular add to pay (e.g., longevity, coach, acting) and step increases that will be effective from current date and potential retirement date, or
 - Highest annual pay in prior 3 years, if member was in higher paid position

Functionality from Foxpro system:

- Allow for entry of the following for requested retirement meeting: member, date of appointment, retirement date, and monthly gross pay to be used as basis of pension (from Payroll system query)
- Based on date of birth and years of service compute: age at retirement, years of service at retirement (adjusted for time loss days), earliest retirement date (based on age and years of service)
- Allow for establishing estimated pension COLA percentage (for base pay and separate percentage for longevity pay) for each of the next 25 years
- Compute base rate of pay (\$/hr) for each of the next 25 years, considering COLA percentage for each year
- Compute base monthly pension for member and survivor for four elective accrual rates (2.25%, 2.4%, 2.6% and 2.8%); computation based on monthly gross pay at retirement times percentage of final pay (varies by elective accrual rate)
- Compute base monthly pension with base tax offset for above accrual rates, per Senate Bill 656 and House Bill 3349 (9.89% for pension earned prior to 10/1/91, plus 1% to 4% for pension earned after 10/1/91)

PROJECT APPENDIX D

Phase Four

Contractor will begin work on the Improvements in Phase Four upon Implementation of all Phase Three services.

Improvement: Improve Ability To Do Retro Checks. The Disability and Expediting System needs to be modified to allow for creation of retro checks similar to the Pension System. There will be some minor database changes and screen development along with some new retro check processes.

Profile:

- Allow for entry of retro dates and percentage of pay or retro period
- Based on historical TL and/or pension payments generated during the retro period, compute retro amounts (also considering all other transactions during that period, such as voids)
- Generate retro checks

VFP (Hours)

System Design	4 - 6
Development	10 - 20
Implementation/Training	2 - 3

Improvement: Support Death Benefit Determination for Multiple People. Create child tables and screens to support multiple entries for Alternate Check and Alternate 1099 Address.

Profile:

- Allow for multiple entries for "Alternative Check" and "Alternate 1099 Address" button

VFP (Hours)

System Design	1 - 2
Development	3 - 6
Implementation/Training	1 - 2

Improvement: Improve Pension Cost of Living Adjustments. Allow for a global update with a separate COLA rate for Old Plan and New Plan members. Create a COLA audit and history files with inquiry screens.

Profile:

- Add x.xx% to the final month of the prior year for "new" plan members
- For "old" plan members, apply x.xxxx% to the final month of the prior year

VFP (Hours)

System Design	1 - 2
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PROJECT APPENDIX E

Phase Five

Phase Five services will be conducted according to the procedures set forth in Section 1, Minor System Enhancements.

Minor System Enhancements: Any user reported "bug" in the software will be corrected as part of the support agreement at no additional cost. There are very few of these listed on the document and most of these can be corrected when the system is converted to Visual Foxpro. Based upon the limited information provided on the small enhancements, the following outlines the estimated time to accomplish these items.

Profile:

- Have member contribution amount automatically brought forward to widow's master
- Fix – Get rid of WATCOM Win 386 Error which appears disallows launch of Foxpro after activity of PC
- Fix – When in Injury Screen and user switches to Master Screen, Injury Screen should not revert to last member in system
- List all fields in FoxFire lists and improve usability
- Make "designate a run time" options work in FoxFire reports
- Add claim number to Injury History Screen
- Add ability to preview and run only pages needed of reports (i.e., transactions sheets)
- Change Time Loss Screen to number of hours missed instead of number of days
- Add PKA field (previous known as) with date changed and ability for multiple names
- In claim TX box on Injury Screen, allow for more information
- Fix – On Injury Screen, Claims Status box should not automatically change
- Add totals to all columns on Transaction History Reports
- Add box for rank at retirement
- Add box for RX on Injury Screen
- Fix – If retirement date is 31st of month then the calculation for First Payment Amount is not being done correctly on Pension Application. It is producing \$0 amount, which is not correct
- Fix – Spousal information is not appearing on Pension Application
- Add DRO information to Pension Applications, Member Master and Pension Master

VFP (Hours)

System Design	4 – 6
Development	10 – 20
Implementation/Training	2 – 4