



# Statement of Work (SOW)

## Issued by

## Rocket Matter

### Project Overview

The Arkansas Department of Human Services is asking Rocket Matter to provide ten custom reports to help automate and manage their caseload, workflows, track stages of a case and the outcomes. Rocket Matter will allow the users to export the data from these new reports as needed to an Excel spreadsheet without the need of manual data entry. The implementation of Rocket Matter and the new customized reports, the Arkansas Department of Human Services will see a decrease in errors, redundancy, and an increase in overall efficiency and productivity.

### Goal

The goal of this project is to provide the Arkansas Department of Human Services data-driven and analytical reporting customized per the department's requirements and objectives.

### Task/Deliverables

#### **Expense Activity Type Requirements:**

The standard expense activity type will be modified to include a field for units. The amount field will be the amount per unit and a total for the expense will be displayed that multiplies the unit times the amount. This will allow for tracking of mileage and other quantity driven expenses within the system.

Tasks and events will have additional fields added for any mileage associated with the activity. This will allow for the tracking of mileage and the data entered will be queried for all necessary reports. In summary, when working on tasks and events, a user will be able to add mileage. There will be a report that shows the required information as requested (e.g. County, Judge, Matter Type, Mileage Summary, Resource, etc.).

**Caseload Report Requirements:**

The Caseload Report will query for county, case type and primary attorney combinations and will group at common intersections. Of those results, case types that match CW or APS will be further grouped by judge. Results will be broken out into year and month rows. These result rows will include data points for the year, month, county, case type, judge (if applicable), position number, attorney first name, attorney last name, the number of cases that were opened during the year and month, the number of cases that were closed during the year and month, the number of cases active during the year and month and total mileage entered for the matter by the primary attorney.

If a case was closed, it will not be tallied as active for that year and month's case calculation even it is was active up until the last day of the month.

If a case was opened, it will be added to the sum of active cases for that year and month even it was opened on the last day of the month.

- Position number will be reported from a custom field on the user record.
- County will be drawn from a custom field on the matter.
- Mileage calculations will be drawn from primary attorney expenses tagged as "mileage" on the given matter.

Filters will be added for Month and year start and end values. If left blank, the report will query for all available data.

The report will be sorted alphabetically by county name and will offer CSV exporting.

**Hearing Report Requirements:**

The Hearing Report will query for county, case type and primary attorney combinations and will group at common intersections. Of those results, case types that match CW or APS will be further grouped by judge. Results will be broken out into year and month rows. These result

rows will include data points for the year, month, county, case type, judge (if applicable), position number, attorney first name, attorney last name, actual days in court, number of hearings conducted, and total time in court.

- Position number will be drawn from a custom field on the user record.
- County will be drawn from a custom field on the matter.
- Actual days in court will add one count for each day that has one or more hearing events occur.
- Number of hearings conducted will total all the hearing events for each grouped row in the result set.

Filters will be added for month and year start and end values. If left blank, the report will query for all available data. A filter will also be created for ICWA status, when enabled, only matters with this tag will be calculated into the result set.

Tagging child welfare and ICWA cases via a Matter Template will ensure that when a matter is created these tags can be automatically added. Furthermore, you can add the tags to an existing matter. This will allow reports on all ICWA cases that are either open, closed, etc.

The report will be sorted alphabetically by county name and will offer CSV exporting.

### **Covered Hearing Report Requirements:**

The Covered Hearing Report will query for county, case type and primary attorney combinations and will group at common intersections. Of those results, case types that match CW or APS will be further grouped by judge. The report will only list primary attorneys who had events scheduled for matters in which they themselves are not the primary attorney for that county, case type, judge (if applicable) combination and will display totals for how many events met this criteria. Results will be broken out into year and month rows. These result rows will include data points for the year, month, county, case type, judge (if applicable), position number, attorney first name, attorney last name, and number of hearings covered.

- Position number will be drawn from a custom field on the user record.
- County will be drawn from a custom field on the matter.
- Number of hearings covered will be derived from how many hearings the attorney attended for each county, case type, judge combination that they themselves were not the primary attorney on the matter.

Filters will be added for month and year start and end values. If left blank, the report will query for all available data.

Tags will be used to track hearings won, hearings lost and/or hearings in general for events, tasks, time and expenses. Using tags will generate the proper outcome reports.

The report will be sorted alphabetically by county name and will offer CSV exporting.

### **CW Outcome Report:**

The CW Outcome Report will query for county, case type, primary attorney and judge combinations and will group at common intersections. Results will be broken out into year and month rows. These result rows will include data points for the Year, Month, County, Case Type, Judge, Position Number, Attorney First Name, Attorney Last Name, Adj - Won, Adj - Lost, TPR - Won, TPR - lost, Custody to Parent, Adoption, Guardianship, Permanent Custody, NRE, Contempt, and Do-not-move Order.

- Position number will be drawn from a custom field on the user record.
- County will be drawn from a custom field on the matter.
- Adj - Won, Adj - Lost, TPR - Won and TPR - Lost will be calculated from the corresponding matter status of each CW case type.
- Parent, Adoption, Guardianship, Permanent Custody, NRE, Contempt, and Do-not-move Order columns will be queried from matter custom fields.

Filters will be added for Month and year start and end values. If left blank, the report will query for all available data.

The report will be sorted alphabetically by county name and will offer CSV exporting.

### **APS Outcome Report:**

The APS Outcome Report will query for county, case type, primary attorney and judge combinations and will group at common intersections. Results will be broken out into year and month rows. These result rows will include data points for the Year, Month, County, Case Type, Judge, Position Number, Attorney First Name, Attorney Last Name, LTC - Won, LTC - Lost, DNR - Granted, DNR - Denied, Guardianship, Permanent Custody, and Contempt.

- Position number will be drawn from a custom field on the user record.
- County will be drawn from a custom field on the matter.
- LTC values will be calculated from custom fields on the matter.
- DNR values will be calculated from custom fields on the matter.
- Guardianship, Permanent Custody, and Contempt will be calculated from custom fields on the matter.

Filters will be added for Month and year start and end values. If left blank, the report will query for all available data.

The report will be sorted alphabetically by county name and will offer CSV exporting.

### **OPG Outcome Report:**

The OPG Outcome Report will query for county, case type, primary attorney and judge combinations and will group at common intersections. Results will be broken out into year and month rows. These result rows will include data points for the Year, Month, County, Case Type, Judge, Position Number, Attorney First Name, Attorney Last Name, Guardianship Granted, Guardianship Denied, Successor Guardianship Granted, and Regained Capacity.

- Position number will be drawn from a custom field on the user record.
- County will be drawn from a custom field on the matter.
- Guardianship denied or granted values will be calculated from custom fields on the matter.
- Successor Guardianship Granted and Regained Capacity will be calculated from custom fields on the matter.

Filters will be added for Month and year start and end values. If left blank, the report will query for all available data.

The report will be sorted alphabetically by county name and will offer CSV exporting.

### **Admin Outcome Report:**

The Admin Outcome Report will query for county, case type and primary attorney combinations and will group at common intersections. Results will be broken out into year and month rows. These result rows will include data points for the Year, Month, County, Case Type, Judge, Position Number, Attorney First Name, Attorney Last Name, Won, Lost, Do Not Defend Accepted

by Client, Do Not Defend Denied by Client, Hearings Set in Year-Month, and Hearings Continued in Year Month.

- Position number will be drawn from a custom field on the user record.
- County will be drawn from a custom field on the matter.
- Won, Lost would be calculated from a matter custom field.
- Do Not Defend accepted or denied would be calculated from a matter custom field.
- Hearings Year-Month set or continued would be calculated from a matter custom field.

Filters will be added for Month and year start and end values. If left blank, the report will query for all available data.

The report will be sorted alphabetically by county name and will offer CSV exporting.

### **Circuit Outcome Report:**

The Circuit Outcome Report will query for county, case type, primary attorney and judge combinations and will group at common intersections. Results will be broken out into year and month rows. These result rows will include data points for the Year, Month, County, Case Type, Judge, Position Number, Attorney First Name, Attorney Last Name, Hearing Won, Hearing Lost and Hearing Remand.

- Position number will be drawn from a custom field on the user record.
- County will be drawn from a custom field on the matter.
- Hearing Won, Hearing Lost and Hearing Remand will be calculated from a matter custom field.

Filters will be added for Month and year start and end values. If left blank, the report will query for all available data.

The report will be sorted alphabetically by county name and will offer CSV exporting.

### **Timeline Compliance Report:**

The Timeline Compliance Report will query each matter in the system and will display data points for matter information and compliance date custom fields. These fields will include Matter Name, Judge, County, Type, Primary Attorney, Date of 1st Removal / LTC Protection, Date DN Petition Filed, Date Ex Parte Order Entered, Date of PC Hearing, Date PC Order Entered, Date

of Adjudication, Date Adjudication Order Entered, Date of First Review Hearing, Date First Review Order Entered, Date of PPH, Date PPH Order Entered, Date Goal Changed to Adoption Only, Date of Hearing Set at Goal Change, Date TPR Petition Filed, Date of Last Service of TPR, Date of First Day of TPR Hearing, Date of Last Day of TPR Hearing, Date of TPR Decision, Date TPR Order Entered, Date Received Complete Adoption Packet, Date Adoption Petition Filed, and Date Permanency Achieved. The report will include a row below the custom field dates that will display the number of elapsed days since the matter was opened to the date value of the field.

- All date values will be drawn from matter custom fields.

Filters will be added for Month and year start and end values. If left blank, the report will query for all available data.

The report will be sorted alphabetically by county name and will offer CSV exporting.

Biweekly meetings will take place between DHS and Rocket Matter to evaluate progress made on the project. After two meetings (end of week 4), 50% payment #1 will be sent to Rocket Matter via wire transfer. Biweekly meetings will continue for the duration of the project, and upon completion (anticipated end of week 8), final 50% payment #2 will be sent to Rocket Matter via wire transfer.

| Name   | QTY |
|--|-----|
| Estimated Cost for Custom Development<br>Price per negotiated SHI Rate | 136 |

| SHI                | Rocket Matter        |
|--------------------|----------------------|
| Signature: _____   | Signature: _____     |
| Name: Mark Johnson | Name: Stephanie Wood |
| Date Signed:       | Date Signed:         |
| Role:              | Role:                |

| Customer | Rocket Matter |
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|---------------------|----------------------|
|                     |                      |
| Signature: _____    | Signature: _____     |
| Name: Jerald Sharum | Name: Stephanie Wood |
| Date Signed:        | Date Signed:         |
| Role:               | Role:                |